



**DESERT HEALTHCARE DISTRICT  
PROGRAM COMMITTEE  
Program Committee Meeting  
December 08, 2020  
12:00 P.M.**

In lieu of attending the meeting in person, members of the public will be able to participate by webinar by using the following Zoom link:

<https://us02web.zoom.us/j/84926330777?pwd=MExJV1hkN1RPMHppLy83RFZLVGxqZz09>  
**Password: 772926**

Participants will need to download the Zoom app on their mobile devices. Members of the public may also be able to participate by telephone, using the follow dial in information:

Dial in #:(669) 900-6833 To Listen and Address the Board when called upon:  
**Webinar ID: 849 2633 0777**

<i>Page(s)</i>	<b>AGENDA</b>	<i>Item Type</i>
	I. <b>Call to Order</b> – Director Evett PerezGil, Committee Chairperson	
1-2	II. <b>Approval of Agenda</b>	<b>Action</b>
3-6	III. <b>Meeting Minutes</b> 1. November 10, 2020	<b>Action</b>
	IV. <b>Public Comments</b> At this time, comments from the audience may be made on items <u>not</u> listed on the agenda that are of public interest and within the subject-matter jurisdiction of the District. The Committee has a policy of limiting speakers to not more than three minutes. The Committee cannot take action on items not listed on the agenda. Public input may be offered on an agenda item when it comes up for discussion and/or action	
7-13 14-29 30	V. <b>Old Business</b> 1. Funding Requests Schedule 2. Progress & Final Report Schedule 3. Grant Payment Schedule	Information Information Information
	VI. <b>Program Staff Updates</b> 1. Coachella Valley Housing Catalyst Fund – A Bold Housing Investment Solution, Lift to Rise & Riverside County Housing Authority	Information & Discussion
31-90	VII. <b>Grant Funding Requests</b> 1. Voices for Children – Consideration to approve Grant #1149 – \$40,000 for the Court Appointed Special Advocates (CASA) Program	<b>Action</b>
	VIII. <b>Committee Member Comments</b>	Information



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**IX. Adjournment**

Next Scheduled Meeting January 12, 2021



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PROGRAM COMMITTEE MEETING  
MEETING MINUTES  
November 10, 2020**

**Directors & Community Members**

<b>Present via Video Conference</b>	<b>District Staff Present via Video Conference</b>	<b>Absent</b>
Chair Evett PerezGil Vice-President Karen Borja Director Carole Rogers, RN Nicolas Behrman, Community Member Allen Howe, Community Member	Conrado E. Bárzaga, MD, Chief Executive Officer Chris Christensen, Chief Administration Officer Donna Craig, Chief Program Officer Alejandro Espinoza, Program Officer and Director of Outreach Meghan Kane, Programs and Research Analyst Erica Huskey, Administrative and Programs Assistant Andrea S. Hayles, Clerk of the Board	Luciano Crespo, Community Member  Thomas Thetford, Community Member

<b>AGENDA ITEMS</b>	<b>DISCUSSION</b>	<b>ACTION</b>
<b>I. Call to Order</b>	The meeting was called to order at 12:33 p.m. by Chair PerezGil due to technical difficulties.	
<b>II. Approval of Agenda</b>	Chair PerezGil asked for a motion to approve the agenda.	<b>Moved and seconded by Vice-President Borja and Community Member Behrman to approve the agenda. Motion passed unanimously.</b>
<b>III. Meeting Minutes</b> <b>1. October 13, 2020</b>	Chair PerezGil asked for a motion to approve the October 13, 2020 meeting minutes.	<b>Moved and seconded by Director Rogers and Vice-President Borja to approve the October 13, 2020 meeting minutes. Motion passed unanimously.</b>
<b>IV. Public Comment</b>	There was no public comment	
<b>V. Old Business</b> <b>1. Funding Requests</b>	Chair PerezGil summarized the funding requests.  Vice-President Borja inquired on the City of Palm Springs LOI request for \$243k, and whether the request is the same program the city cut due to COVID and budget shortfalls. Donna Craig, Chief Program Officer, explained that the city inquired with the District last year desiring a program match, and the District	

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<p><b>2. Progress and Final Reports Schedule</b></p> <p><b>3. Grants Payment Schedule</b></p>	<p>agreed to match the program at \$125k; however, since it is a collaborative effort with CVAG and CVHEART that was re-funded after the COVID cuts, the city is currently returning with a renewal of the same program. However, the grant is still open; thus, the District, to date, has not reviewed the LOI.</p> <p>Vice-President Borja inquired if Martha’s Village request contains the entire Coachella Valley, if there will be a larger sum than \$200k. Ms. Craig explained that Martha’s Village is recreating the budget at a lower request.</p> <p>Donna Craig, Chief Program Officer, clarified that there are no changes from the prior month with new progress and final reports available in December.</p> <p>Chair PerezGil inquired on any questions of the committee concerning the grants payment schedule.</p>	
<p><b>VI. Program Staff Updates</b></p> <p><b>1. Community Health Needs Assessment (CHNA) and Health Improvement Plan (CHIP)</b></p>	<p>Meghan Kane, Programs and Research Analyst described Health Assessment and Research for Communities (HARC) overview of the focus groups at the Strategic Planning Committee, including the challenges with the community engagement process, increasing the number of participants, engaging the Board, the timeline</p>	

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<p><b>2. Lift to Rise Rental Assistance Program – enrollment events</b></p>	<p>for November and December to complete the focus groups, and input from the preliminary data for pre-and-post COVID.</p> <p>Alejandro Espinoza, Program Officer and Director of Outreach provided an overview of the rental assistance program events with over 600 families enrolled at the most recent event and a waiting list for additional funds from the funding sources to continue to support the families.</p>	
<p><b>VII. Grant Funding Requests</b></p> <p><b>1. Consideration to approve Grant #1135 Hope through Housing: Hope through Housing Foundation Family Resilience - \$20,000</b></p>	<p>Donna Craig, Chief Program Officer, explained Hope through Housing’s request to support the client’s low-income-affordable housing in response to COVID to continue to assist with food and resources.</p> <p>Greg Bradbard, President, Hope through Housing Foundation, and Senior Vice President of Strategic Partnerships, provided an overview of the services and answered questions from the committee.</p>	<p><b>Moved and seconded by Director Rogers and Community Member Behrman to approve Grant #1135 Hope through Housing: Hope through Housing Foundation Family Resilience - \$20,000 and forward to the Board for approval.</b></p> <p><b>Motion passed unanimously.</b></p>
<p><b>VII. Committee Members Comments</b></p>	<p>Director Rogers inquired on the Board and Staff Communications &amp; Policies Committee Meeting and the outcome of the community members' policies. Dr. Bázquez explained that the committee recommendation will go forward to the Board, as previously discussed, which includes a staff report to exclude members of the public as</p>	



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	community members from committees.	
<b>V. Adjournment</b>	Chair PerezGil adjourned the meeting at 12:58 p.m.	<b>Audio recording available on the website at <a href="http://dhcd.org/Agendas-and-Documents">http://dhcd.org/Agendas-and-Documents</a></b>

ATTEST: \_\_\_\_\_  
Evet PerezGil, Chair/Director  
Program Committee

*Minutes respectfully submitted by Andrea S. Hayles, Clerk of the Board*

DRAFT

**FUNDING REQUESTS UPDATE for December 2020 (please see December updates in this color)**

**Information only – status update of new letters of interest and pending applications**

**(includes both mini grants and full grants)**

**The five (5) strategic focus areas for FY 2020-2021 are:**

- 1. Healthcare Infrastructure and Services**
- 2. Behavioral Health/Mental Health**
- 3. Homelessness**
- 4. Vital Human Services to People with Chronic Conditions**
- 5. Economic Protection, Recovery, and Food Security**

Letters of Interest				
Agency	Staff Notes	Status & Staff Notes	Funding Allocation	Strategic Focus Areas FY 2020-2021
<b>Alzheimer's Association</b>	LOI received requesting \$66,500 to support core services Request revised to reflect a lower amount	<b>UPDATE FOR DECEMBER:</b> Stage 2, the application, has been generated. The LOI had been previously sent back for republishing with the recommendation that the organization revise the request to reflect \$30,000 in support specific to the Program and Education Manager towards Care Consultations plus the education costs for the four-week training program for the caregivers.	District	Vital Human Services to People with Chronic Conditions

<b>Healing California</b>	LOI received requesting \$19,786 to support mobile dental and vision services to residents of Eastern Coachella Valley	<b>UPDATE FOR DECEMBER:</b> The grants team conducted a proposal conference on October 12 <sup>th</sup> . It was determined that Healing CA will send us a list of upcoming sites and apply for a mini grant instead. Nothing further has been received from the organization.	District	Healthcare Infrastructure and Services
<b>Youth Leadership Institute</b>	LOI received requesting \$30,000 Que Madre Program	<b>UPDATE FOR DECEMBER:</b> Proposal conference resulted in YLI to review and reevaluate the number of dollars requested and the budget and will come back to the grants team for further discussion. Nothing further has been received from the organization.		Behavioral Health/Mental Health
<b>Joslyn Center</b>	LOI received requesting \$112,350 to support Wellness Center programs	<b>UPDATE FOR DECEMBER:</b> Stage 2 – the application- has been generated with the recommendation that the organization revise the request to reflect solely the		Behavioral Health/Mental Health



		<p>Therapy and Counseling portion of the original request that includes funding for the LCSW Wellness Center Supervisor, 2 behavioral health program interns, &amp; education/training. The funding request will now be <b>\$59,130.</b></p>		
<b>CVAG</b>	<p>LOI received requesting \$700,000 for the continuation of the District's funding match to help sustain the success of the CV Housing First program.</p>	<p><b>UPDATE FOR DECEMBER:</b> Originally a letter requesting a continuation of the match had been received. In the past, the letter was sufficient to merit funding by the Board. However, to warrant equity, fairness and transparency in regard to the newly board-approved grantmaking process, the District asked that CVAG's request be in the form of a grant application. The LOI has been received along with a budget that is currently under</p>	District	Homelessness

		review by the grants team.		
<b>Family YMCA of the Desert</b>	LOI received requesting \$100,000 to offset staff salaries for 28 staff members working at the San Pablo YMCA & La Quinta Museum in support of the Y Distance Learning program.	<b>UPDATE FOR DECEMBER:</b> under review by the grants team	District	Vital Human Services to People with C
<b>American Heart Association</b>	LOI received requesting \$148,144 for managing hypertension in under-resources CV communities	<b>UPDATE FOR DECEMBER:</b> request was <u>declined</u> after review by the grants team due to duplication of services. <b>However,</b> more importantly, the LOI stated two key partners – CV VIM and Clinicas – both of which confirmed that they were <b>not aware</b> of being “partners” in this request.	District	Healthcare Infrastructure/Services
<b>City of Palm Springs</b>	LOI received requesting \$243,600 to support one Behavioral Health Specialist, one Mental Health Peer Specialist, Case	<b>UPDATE FOR DECEMBER:</b> The LOI will not be reviewed until the current open grant has been closed and the District has received all pertinent paperwork, i.e. progress and final	District	Homelessness

	Managers & Mental Health Peer Specialist	reports, and budget reports with receipts of all funds expended.		
<b>Clinicas De Salud Del Pueblo</b>	LOI received requesting \$125,800 to support COVID-19 ID Now Testing Program	<b>UPDATE FOR DECEMBER:</b> The application has been <b>withdrawn</b> by Clinicas as it has been determined to purchase the ID Now Testing Machines from another supplier.	District	Healthcare Infrastructure/Services
<b>Animal Samaritans</b>	LOI received for \$5,000 mini grant to support Humane Education	<b>UPDATE FOR DECEMBER:</b> <b>declined</b> after review by grants team – no alignment with District’s mission and/or strategic plan.	District	Behavioral Health
<b>Pending Applications</b>				
<b>Grantee</b>	<b>Staff Notes</b>	<b>Status</b>	<b>Funding Allocation</b>	<b>Strategic Focus Area FY 20/21</b>
<b>Voices for Children</b>	LOI received requesting \$40,000 to provide CASAs (Court Appointed Special Advocates) to 20 Coachella Valley foster youth and ensure their healthcare needs are addressed.	<b>UPDATE FOR DECEMBER:</b> The application is being presented at the December Program Committee meeting.	District	Healthcare Infrastructure/Services: increased capacity to serve patients through telehealth technology

<p><b>Inland Empire Ronald McDonald House</b></p>	<p>LOI received requesting \$200,000 for Temporary Housing and Family Support Services (same as previous request)</p>	<p>The grants team conducted a September 2<sup>nd</sup> Zoom proposal conference and suggested the request be <u>decreased to \$100,000</u> to more accurately reflect the reality and impacts of COVID-19 on the organization's operations and budget. <b>UPDATE for December:</b> Stage 2 – the application – has been sent back to be republished to reflect the actual numbers of District residents to be served, rather than a blanket anticipated 20% of the total number of families served that was deduced pre-COVID. The request is anticipated to be before the January Program Committee meeting for review.</p>	<p>District</p>	<p>Healthcare Infrastructure and Services</p>
<p><b>Martha's Village &amp; Kitchen</b></p>	<p>LOI received requesting \$200,896 to support the resources necessary to serve an expanded</p>	<p><b>UPDATE FOR DECEMBER:</b> Stage 2, the application, was generated, and MVK will concentrate the request on</p>		

	number of homeless individuals from within the DHCD's Western borders with evidence based best practices such as Housing First	Housing First, the workforce of youth employment and training as well as wrap around services that are given at the Mecca and Desert Hot Springs satellite offices. It is anticipated to bring the full request to the January Program Committee meeting.		
<b>Well in the Desert</b>	LOI received for \$5,000 mini grant to support food services	<b>UPDATE FOR DECEMBER:</b> Stage 2 – the Mini Grant application- has been received and under review by the grants team.	District	Homelessness

**Update for NOVEMBER and DECEMBER 2020**

<b>Progress Reports</b>			
<b>Applicant</b>	<b>Staff Notes</b>	<b>Program/Project Tracking Status</b>	<b>Source</b>
<p><b>HARC #974</b> 2019 Coachella Valley Community Health Survey</p>	<p><b>Grant term: 11/1/18 – 10/31/20</b> <b>Original Approved Amount: \$399,979</b> <b>4<sup>th</sup> Progress report covering the time period from 5/1/20 – 10/31/20</b></p> <p>The total cost of the triennial survey for the three-year cycle has been obtained.</p> <p><b>FUNDRAISING FOR SURVEY</b> Since the last progress report, HARC has continued to submit an average of two grant proposals per month as required.</p> <p><b>EXECUTIVE REPORT DISSEMINATION</b> To date, 126 unique individuals have downloaded the 2019 Executive Report.</p> <p>To date, we have distributed 473 hard copy printed reports. We mailed these to elected officials, tribal leaders, local funders, nonprofits, healthcare agencies, and any individuals who requested a copy.</p> <p><b>OTHER DISSEMINATION</b> HARC has shared the 2019 data with the public in seven press releases (distributed via eblasts and posted on HARC's website)</p> <p><b>TREND REPORTS</b> We also created the four trend reports per our "final contingencies" on this grant. The report</p>	<p>The grantee states that the program/project is NOT on track.</p> <p>It took longer than expected to get HARCsearch up and running, and having the final check lost in the mail was another unexpected delay. However, the site is ready and should be live for all by the end of the week (November 5). We'll be publicizing it going forward. It also took us longer than expected to create the trend reports; they will be submitted via email today as required and we can revise if requested by DHCD/F.</p>	<p>District grant funds</p>

	<p>format is based on the requirements laid out in our emails between HARC and DHCD staff beginning March 16, 2020 and concluding on April 8, 2020.</p> <p>The four trend reports are: Healthcare Report; Major Disease Report; Mental Health Report; and Socioeconomic Needs Report. <b>Staff notes: These reports are available upon request and are pending posting on the DHCD website.</b></p> <p><b>HARCSEARCH</b> As mentioned in the last progress report, we decided to hire Intelligent Clout, an LA-based firm, to revamp and reprogram HARCsearch. The total cost for IC to redesign and host the site was \$16,800.</p> <p><b>TRAININGS</b> HARC committed to provide 15 trainings trainings/workshops to potential data users in the region on how to find the data that they need, including both HARC's data and secondary data (e.g., Census data, school district data, etc.). HARC posted the opportunity to request customized trainings/workshops with data on our website and social media. We provided trainings and information to those who responded to this announcement, as well as a few who reached out separately for custom data runs.</p>		
<p><b>FIND Food Bank</b> #1045 Ending Hunger Today, Tomorrow, and for a Lifetime</p>	<p><b>Grant term: 4/1/20 – 3/31/21</b> <b>Original Approved Amount: \$401,380</b> <b>2<sup>nd</sup> progress report covering the time period from 7/1/20 – 9/30/20</b></p> <p><b><u>Progress This Reporting Period</u></b></p>	<p>The grantee states the program/project is on track.</p> <p><i>Please describe any specific issues/barriers in meeting the desired outcomes: The COVID-19</i></p>	

	<p><b>Progress Outcomes:</b>          FIND Food Bank’s SMART Goal #1 is to provide 5 million pounds of fresh produce, 2.5 million pounds of which will be in the western District region. In the second quarter, FIND has provided a total of 3,214,419 pounds of produce. Therefore, within the first 2 quarters of the grant period, FIND has provided a total of 6,255,349 pounds of produce, exceeding our overall goal by 25.1%.          Of the 3,214,419 pounds of produce, 1,409,239 pounds has been provided within the western District boundaries. Therefore, within the first 2 quarters of the grant period, FIND has provided a total of 2,729,644 pounds of produce within the western District boundaries, exceeding our overall goal by 9.2%.</p> <p>FIND’s SMART Goal #2 is to provide Kids’ Farmers Markets at Agua Caliente Elementary School, in Cathedral City, at Della S. Lindley Elementary School in Thousand Palms, and at Painted Hills Middle School, in Desert Hot Springs. In the second quarter, FIND has distributed 269,531 pounds of food, 162,974 pounds of which (or 60.5%) was in the form of fresh produce.          Due to the COVID-19 school closures, FIND continues to serve the Della S. Lindley Elementary School at nearby Thousand Palms Park.</p> <p>FIND’s SMART Goal #3 is to add a new Community Health Worker to serve the western region of the District, moving our current Community Health Worker, funded by Loma Linda University Health, to the eastern region of</p>	<p>pandemic has impeded the hiring process of a new Community Health Worker. In the first quarter, FIND had completed the interview process began making offers. In the second quarter, FIND Food Bank made offers to 2 individuals. Unfortunately, both individuals declined – one for personal reasons, and the other due to childcare needs and COVID-19.</p> <p><i>Describe any unexpected successes during this reporting period other than those originally planned:</i> In the second quarter, FIND Food Bank served 5,629 homebound people. Of those individuals, 93%, or 5,239 homebound individuals, were Desert Healthcare District residents. FIND is pleased to be able to continue to provide food assistance to those who are confined to their homes and unable to reach out for any social services or food assistance.</p>	
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	<p>the District. FIND's Community Health Worker has been serving the western region and FIND continues work to identify a new Community Health Worker. Two different offers were made to 2 qualified individuals; however, both individuals declined.</p> <p>Nevertheless, in the second quarter, FIND's current Community Health Worker provided significant assistance within the Western District:</p> <ul style="list-style-type: none"> <li>• 39 CalFresh/Medi-Cal applications (59 in all areas)</li> <li>• 4 Housing and Transportation (Neighborhood/Built Environment) (10 in all areas)</li> <li>• 24 Economic Stability (43 in all areas)</li> <li>• 7 Education/Tutoring/Financial Literacy (26 in all areas)</li> <li>• 6,894 Food/Nutrition (11,891 Food/Nutrition in all areas)</li> <li>• 15 Healthcare Referrals (15 in all areas)</li> <li>• 44 County Benefit Referrals (Unemployment, SSI, Section 8, Adult Protective Services) (69 in all areas)</li> <li>• 6 Social/Legal/Community (11 in all areas)</li> </ul> <p>FIND's SMART Goal #4 is to have FIND's entire Community Outreach Team participate in CVHIP. In the first quarter, all program staff were trained on the CVHIP platform. In the second quarter, a total of 156 referrals were made utilizing CVHIP.</p> <p>FIND's SMART Goal #5 is to partner with the DHCD to support, promote, and assist in implementing their Behavioral Economics program through FIND's Agency Network and Mobile Markets ensuring nutrition education to</p>		
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	<p>food insecure clients. In the second quarter, FIND held a virtual meeting in August.</p> <p>Working closely with DHCD, we are developing a new avenue to implement the Behavioral Economics program as the agencies have been unresponsive to changes in the wake of the COVID-19 crisis. Nutrition education videos are now available on FIND Food Bank's new online volunteer platform. These educational videos provide critical nutrition training to the FIND volunteers who assist at FIND food distributions.</p> <p><u>Progress on the number of District residents served:</u>  <b>0-5:</b> 19,902  <b>6-17:</b> 67,497  <b>18-24:</b> 50,972  <b>25-64:</b> 50,972  <b>65 or older:</b> 39,626</p>		
<p><b>Coachella Valley Rescue Mission</b>  #1023  Transportation for Seniors and Homeless Hospital Discharge Patients</p>	<p><b>Grant term: 11/1/19 – 10/31/20</b>  <b>Original Approved Amount: \$216,200</b>  <b>4<sup>th</sup> progress report covering the time period from 8/1/20 – 10/31/20</b></p> <p><b><u>Progress This Reporting Period</u></b></p> <p><b>Progress Outcomes:</b> CVRM purchased the final vehicle designated for the transportation of our elderly clients. Hospital referrals in August were 24 and September 34. CVRM received 30 age 18-54; 15 age 55 +; 12 ages 65+; 1 age 75+. CVRM designated vehicles transported one hundred and thirty-four individuals to off-campus appointments, such as medical, dental, behavioral health, job interviews, and apartment searches. The vehicles allow the elderly clients</p>	<p>The grantee states that the program is on track.</p> <p><b><i>Describe any unexpected successes during this reporting period other than those originally planned:</i></b>  CVRM's ability to transport senior clients to appointments comfortably also saved the staff time to load and unload elderly passengers. The time saving was an unexpected benefit of the Desert Healthcare District's grant. Time is a gift that filtered down to CVRM's staff having more one on one time with the clients. The comfort that the beds</p>	<p>Desert Healthcare District</p>

	<p>ease of access into and out of the new vehicles. The beds' purchase and use to accommodate elder homeless clients help keep the client off the floor by stacking the beds to the regular bed height.</p> <p><u>Progress on the number of District residents served:</u>  <b>0-5: 1</b>  <b>6-17: 2</b>  <b>18-24: 13</b>  <b>25-64: 69</b>  <b>65 or older: 15</b></p>	<p>provided the elderly clients and the ease of transport to various appointments make the elderly in CVRM care and safer.</p>	
<p><b>Olive Crest Treatment Center</b>  #1085 General Support for Mental Health Services to Vulnerable Children &amp; Families in Coachella Valley</p>	<p><b>Grant term: 6/1/20 -5/31/21</b>  <b>Original Approved Amount: \$50,000</b>  <b>1<sup>st</sup> progress report covering the time period from 6/1/20-11/30/20</b></p> <p><b><u>Progress This Reporting Period</u></b></p> <p><b>Progress Outcomes:</b>  Goal #1: 100% of children in Olive Crest care have been risk-free each month of the reporting period. (Goal of 99%)  Goal #2: 100% of foster and residential children have had one or less placement moves during the reporting period. (Goal of 95%)  Goal #3: 88% of children have successfully completed Olive Crest's programs and been discharged to a permanent placement, or successfully graduated or transitioned to a lower level of care. (Goal of 85%)  Goal #4: 91% of clients have shown improvement from intake to cluse as measured by the percentage of children with improved CAFAS scores (Goal of 80%)  Goal #5: 81% of clients have shown</p>	<p>Grantee states the project/program is on track.</p> <p><i>Please describe any specific issues/barriers in meeting the desired outcomes:</i></p> <p>COVID-19 and the associated health guidelines have altered our delivery of mental health services. Tele-health and tele-psychiatry have replaced in person meetings and the impact of this change on effectiveness remains to be seen.</p> <p>On-boarding of additional psychiatrists took longer than expected but 4 part-time psychiatrists are now actively engaged.</p> <p><i>What is the course correction if the project/program is not on track?</i></p>	<p>District – ECV Funding Pot</p>

	<p>improvement to stable state levels of acuity. (Goal of 80%)</p> <p><u>Progress on the number of District residents served:</u>  <b>0-5:</b> 49  <b>6-17:</b> 331  <b>18-24:</b> 17  <b>25-64:</b> 0  <b>65 or older:</b> 0</p>	<p>N/A. The project is proceeding well and we are fortunate to have eliminated any wait time for requested and/or needed psychiatric services.</p> <p><i>Describe any unexpected successes during this reporting period other than those originally planned:</i></p> <p>COVID-19 and extended quarantining has also led to increased acuity in new cases which has increased the demand for psychiatric services. Demand for these services are expected to increase as youth return to school, daycare and other activities in which mandated reports will be present to identify child abuse and neglect.</p> <p>The Olive Crest team is incredibly grateful for the timely and critical support of Desert Healthcare District and Foundation in enabling us to keep pace with this need.</p> <p>One specific story of success involves two brothers who were currently living together. It was planned that they would need to be split up - their behaviors and needs were exceeding their family's abilities. However, when Olive Crest was able to facilitate access to</p>	
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		<p>psychiatric care, one of the boys was prescribed medication - this significantly helped his behaviors, and the family has been able to keep both boys together!</p>	
<p><b>One Future Coachella Valley</b> #994 Mental Health College &amp; Career Pathway Development Initiative</p>	<p><b>Grant term: 6/1/19 – 5/31/21</b> <b>Original Approved amount: \$700,000</b> <b>5<sup>th</sup> progress report covering the time period from 6/1/20 – 8/31/20</b></p> <p><b><u>Progress This Reporting Period</u></b> <b>Progress Outcomes:</b></p> <p>By the end of the grant, two (2) high schools will add a Behavioral Health pathway resulting in a minimum of 60 additional students annually exposed to mental health careers:</p> <ul style="list-style-type: none"> <li>- The BH A-Team updated their Pathways to Behavioral Health: Educations and Career Resources Website, expanding the "Career Exploration" page, and adding a "Be Well" page with wellness resources. <a href="https://behavioralhealthofcv.weebly.com/">https://behavioralhealthofcv.weebly.com/</a></li> </ul> <p>By the end of the grant, four (4) presentations on Mindfully Resilient curriculum and resources are provided to professionals in CVUSD, DSUSD and PSUSD.</p> <ul style="list-style-type: none"> <li>- No presentations were given during this quarter, due to summer break and COVID-19 distance learning protocols.</li> </ul>	<p>The grantee states that the project/program is on track with no specific issues/barriers to meeting desired outcomes.</p> <p>However, <i>Describe any unexpected successes during this reporting period other than those originally planned:</i></p> <p>The ability to quickly pivot and deliver student support services, HCC internship experiences and facilitate all program activities using online platforms was impressive. Our team did a very good job of continuing program momentum, even with the challenges posed by the pandemic.</p>	

	<p>By the end of the grant, three (3) schools pilot a school-wide behavioral health wellness practices and career awareness programs.</p> <ul style="list-style-type: none"> <li>- No activity on this element was completed this quarter due to summer break and COVID challenges.</li> </ul> <p>By the end of the grant, up to forty (40) behavioral health undergraduate and graduate students will have been awarded up to \$200,000 in scholarships; completed a C2 Navigator profile and scholarship application; been assigned a Behavioral Health A-Team mentor; completed a college and career plan; completed a financial aid package review and plan; achieved 90% persistence and 90% on track for degree completion</p> <ul style="list-style-type: none"> <li>- OneFuture Coachella Valley (OFCV) is excited to report that seven (7) students have been awarded to date for the 2020-21 academic year. Among these students, four (4) are renewal scholarship recipients that pursuing Mental Health majors and careers at CSU San Bernardino, UC Riverside, UC Irvine and Cal Baptist University. Following is a summary on the scholars and their progress this Fall term: <ul style="list-style-type: none"> <li>• 100% of scholars have completed a College &amp; Career Plan for the 2020-21 academic year.</li> <li>• 100% of scholars have</li> </ul> </li> </ul>		
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	<p>submitted the required documents for their Fall disbursement.</p> <ul style="list-style-type: none"> <li>• 100% of students attended OFCV's Student Leadership Conference in June.</li> <li>• Scholars are awarded in an average of 14 units this Fall term.</li> </ul> <p>While the students are on track academically, the COVID-19 pandemic has created challenges that have increased the need for mental health support services and access to internet and related technology. For example, during the one-one-one OFCF counseling sessions, students had the following comments regarding their current needs and mental wellness:</p> <ul style="list-style-type: none"> <li>• "Parents are both unemployed due to COVID. Trying to adjust to financial need gap"</li> <li>• "Doing well - meditating and hiking to stay clear and positive."</li> <li>• "Experiencing technology issues. Have upgraded to higher WIFI level. WIFI has been challenge."</li> <li>• Adjusting to online. Focused on finishing las year strong</li> </ul>		
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	<p>In response to the pandemic, OFCV pivoted its annual summer supports to offer a month of online workshops and services designed to help students with their mental wellness, academic and career preparation. Topics included a wide variety of college and career readiness as well as Meditation and Desk Yoga; Feeding Your Brain; Community Resources – Cal Fresh &amp; Lending Circles and Career Panels.</p> <p>Among the seven (7) DHCD Mental Health Scholars, students attended between six (6) and (9) workshops each and engaged in question and answer sessions after the presentations. While the current DHCD scholars have actively participated in program supports, one (1) student had to withdraw from college this Fall, due to challenges with internet connectivity and difficulties with the online learning process. The student will continue to be engage in the Mental Health Student Cohort and support services during the academic year.</p> <p>In addition, OFCV is in the process of completing the second review of DHCD Mental Health scholarship applications submission and interviews. Up to thirteen (13) students will be awarded by the end of October 2020 and participate in the DHCD Mental Health Student Cohort. OFCV looks forward to sharing updates on the student progress this academic year, along with learning opportunities in the wake of the COVID-19 pandemic.</p> <p>By the end of the grant, a minimum of twelve (12) undergraduate students pursuing Behavioral Health related majors will have</p>		
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	<p>completed a 10-week, paid summer internship; completed four (4) of five (5) leadership workshops and agreed to participate in a minimum of two (2) web-based or 1:1 interactions during the academic year following their internship.</p> <p>OFCV was able to secure an additional behavioral health host site, so five HCC 2020 summer interns completed projects primarily focused on mental and behavioral health and three additional sites included behavioral health elements with resource coordination for families impacted by COVID. Behavioral Health host sites were: Coachella Valley Unified School District, Jewish Family Services of the Desert, COFEM, Coachella Unincorporated, and OneFuture Coachella Valley. Sites with behavioral health related projects were Lift to Rise and Lideres Capesinas.</p>		
<b>Final Grant Reports</b>			
<b>Applicant</b>	<b>Staff Notes</b>	<b>5 things to be done differently if you were to implement this service or program again</b>	<b>Source of Funding</b>
<p><b>Jewish Family Service of the Desert</b> #1017 Preventing Homelessness Among Coachella Valley Residents with Low Incomes by supporting salaries for case management staff</p>	<p><b>Grant term: 10/1/19 – 9/30/20</b> <b>Original Approved Amount: \$90,000</b> <b>Final Outcomes:</b> JFS project goals for the period were largely surpassed, with the total number of clients served by the case management program exceeding the goal by 35%. Due in part to limited availability of funds, the number of clients receiving emergency financial assistance was lower than the projected target. In total, 1,766 unduplicated clients were provided with 5,157 case management services, including direct assistance as well as connections</p>	<p>1.JFS would seek out additional sources of pass-through funds to ensure adequate emergency assistance funding is available throughout the fiscal year.</p> <p>2.JFS would collaborate more frequently with other emergency assistance organizations to increase</p>	<p>District</p>

	<p>to other available benefits (such as unemployment, Medi-Cal, and CalFresh) and 99% of clients reported their was emergency resolved and their quality of life improved.  <u>Final number of District residents served:</u>  <b>0-5:</b> 0  <b>6-17:</b> 0  <b>18-24:</b> 40  <b>25-64:</b> 1,141  <b>65 or older:</b> 585</p> <p>1. <b>Please describe any specific issues/barriers in meeting the proposed program/project goals:</b> While requests for JFS case management services have increased dramatically due to COVID-19, the need for financial support is far greater than what can be offered by JFS alone. Many clients have been connected to United Lift, where upwards of \$3,500 in support is offered, per person, in lieu of JFS support amounting to far less.</p> <p>2. <b>Please describe any unexpected successes other than those originally planned</b> The migrant community concern regarding “public charge”—an immigration ruling related to not being able to become a U.S. Citizen based on receiving public benefits—has been stated as a reason for migrant individuals and families not seeking connection to available JFS case management and emergency assistance services. Previously, the exact nature of public charge was not understood, so staff counsel to clients was uncertain. JFS has since engaged with a law firm specializing in migrant services, and its understanding of</p>	<p>support for clients and decrease resource utilization.</p> <p>3.JFS would establish a location in the East Valley for clients to submit support documentation (e.g., rent agreement, utility bills, etc.), reducing travel to the JFS office in Palm Springs or the need to mail original documents.</p> <p>4.JFS would seek additional interns to support the case management program.</p> <p>5.JFS would utilize its improved Zoom capabilities to capture client testimonials.</p>	
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	<p>public charge has improved, leading to better counsel for members of the migrant community.</p> <p><b>3. After the initial investment by the DHCD how will the program/project be financially sustained?</b> JFS will continue to seek additional corporate, foundation and municipal grants to support this vital program for Coachella Valley residents. Specifically, emerging or newly discovered sources of funding will be sought to help sustain personnel capacity as well as direct assistance. In the event of funding gaps, agency general operating funds may be called upon to support the provision of this much-needed community service.</p>		
<p><b>Coachella Valley Rescue Mission #1023</b> Transportation for Seniors and Homeless Hospital Discharge Patients</p>	<p><b>Grant term: 11/1/19 – 10/31/20</b> <b>Original Approved Amount: \$216,200</b> <b>Final Outcomes:</b></p> <p>The Coachella Valley Rescue Mission accomplished its goals for the "Transportation for senior and Hospital Referrals" project. CVRM bought three cars to replace the twelve passenger vans used to transport clients off campus to various appointments, purchased unique beds for seniors, and provided the staff for this project. CVRM has exceeded the expectation that this grant provided. During COVID-19, CVRM clients sheltered-in-place, and CVRM has remained open 24/7. Eleven months into this project, CVRM responded to 262 senior hospital referrals averaging 24 referrals per month. CVRM hosted over 1722 elderly clients during the grant period. The vehicles allowed staff members to take hospital</p>	<ol style="list-style-type: none"> <li>1. Work with HMIS to able to pull different ages. Example DHCD -0-5; 6-17; 18-24; 25- 64; and 65 +, HMIS reports : under 10 years; 10-19; 20-29; 30-39; 40-49; 50-59; 60+ years . CVRM would like HMIS to report in more detail such as ages 50, 55, 60, 65, 70, 75.</li> <li>2. Add side chair handles on the vehicles</li> <li>3. Build a relationship with Adult Protective Services during the referral process</li> <li>4. Development an inventory of housing for seniors</li> </ol>	

	<p>referrals to clinics for testing and provide a hotel room while waiting for test results. The staff provided three meals daily to the hotel rooms. The additional staff and vehicles allowed the care of this unique group of homeless clients.</p> <p><i>Final number of District residents served:</i>  <b>0-5:</b> 48  <b>6-17:</b> 73  <b>18-24:</b> 462  <b>25-64:</b> 2,976  <b>65 or older:</b> 635</p> <p><i>Please answer the following questions</i></p> <p><b>Please describe any specific issues/barriers in meeting the proposed program/project goals:</b></p> <p>CVRM met all our proposed goals. The hospital staff time spent referring the homeless and working out an exit plan with CVRM which takes about an hour. Then the individual would leave the hospital and never arrive at CVRM. The hospitals and CVRM are working on putting systems in place that will ensure that the homeless individuals arrive at CVRM.</p> <p><b>Please describe any unexpected successes other than those originally planned:</b></p> <p>Our client K. Randall is a 58-year-old elderly woman that uses a walker to help her get around due to a bad leg. She was very appreciative of the vehicle we used to transport her to and from appointments. K. has had to go</p>	<p>5. Develop a process that will track the hospital referrals that do not show up at CVRM.</p>	
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	<p>to RI in Palm Springs, the pharmacy several times to pick up medication, and Oasis in Indio on several occasions. She was able to get in and out of the vehicle using the handle and did not struggle. She mentioned it was easier to lift her walker into the back and take it out because the car was much lower, and her walker is very lightweight. The client is very appreciative and thankful for the comfort provided during transportation.</p> <p><b>After the initial investment by the DHCD how will the program/project be financially sustained?</b></p> <p>CVRM has the structure and for the past year now the experience in working with local hospitals to house the homeless exiting from their hospital. Communication has improved with these partners. CVRM cares for the homeless that is our mission. CVRM will be able to maintain the vehicles, and the staff is now part of CVRM permanent staff. CVRM will maintain this program through donations and funding with our local cities and business. 2021 marks CVRM's 50th year in business.</p>		
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DESERT HEALTHCARE DISTRICT							
OUTSTANDING GRANTS AND GRANT PAYMENT SCHEDULE							
As of 11/30/20							
TWELVE MONTHS ENDED JUNE 30, 2021							
Grant ID Nos.	Name	Approved Grants - Prior Yrs	Current Yr 2020-2021	6/30/2020 Bal Fwd/New	Total Paid July-June	Open BALANCE	
2014-MOU-BOD-11/21/13	Memo of Understanding CVAG CV Link Support	\$ 10,000,000		\$ 8,330,000	\$ -	\$ 8,330,000	
2018-974-BOD-09-25-18	HARC - 2019 Coachella Valley Community Health Survey - 2 Yr	\$ 399,979		\$ 39,999	\$ -	\$ 39,999	
2019-985-BOD-03-26-19	Coachella Valley Volunteers in Medicine - Primary Healthcare & Support Services - 1 Yr	\$ 121,500		\$ 12,150	\$ 12,150	\$ -	
2019-986-BOD-05-28-19	Ronald McDonald House Charities - Temporary Housing & Family Support Services - 1 Yr	\$ 200,000		\$ 20,000	\$ 20,000	\$ -	
2019-997-BOD-05-28-19	Martha's Village & Kitchen - Homeless Housing With Wrap Around Services - 1 Yr	\$ 200,896		\$ 20,090	\$ 20,090	\$ -	
2019-989-BOD-05-28-19	Pegasus Riding Academy - Cover the Hard Costs of Pegasus Clients - 1 Yr	\$ 109,534		\$ 10,954	\$ 10,954	\$ -	
2019-994-BOD-05-28-19	One Future Coachella Valley - Mental Health College & Career Pathway Development - 2 Yr	\$ 700,000		\$ 385,000	\$ 78,750	\$ 306,250	
2019-1000-BOD-05-28-19	Voices for Children - Court Appointed Special Advocate Program - 1 Yr	\$ 24,000		\$ 2,400	\$ 2,400	\$ -	
2019-1017-BOD-09-24-19	Jewish Family Services - Case Management Services for Homeless Prevention - 1 Yr	\$ 90,000		\$ 9,000	\$ 8,855	\$ 145	
	Unexpended funds Grant #1017					\$ (145)	
2019-1023-BOD-10-22-19	CVRM - Transportation for Seniors & Homeless Hospital Discharge Referrals - 1 Yr	\$ 216,200		\$ 118,910	\$ 97,290	\$ 21,620	
2019-1021-BOD-11-26-19	Neuro Vitality Center - Community Based Adult Services Program - 6 Months	\$ 143,787		\$ 79,083	\$ 50,323	\$ 28,760	
	Unexpended funds Grant #1021					\$ (28,760)	
2020-1045-BOD-03-24-20	FINN Food Bank - Ending Hunger Today, Tomorrow, and for a Lifetime - 1 Yr	\$ 401,380		\$ 311,069	\$ 180,622	\$ 130,447	
2020-1129-BOD-05-26-20	Coachella Valley Volunteers In Medicine - Response to COVID-19	\$ 149,727		\$ 149,727	\$ 149,727	\$ -	
2020-1085-BOD-05-26-20	Olive Crest Treatment Center - General Support for Mental Health Services	\$ 50,000		\$ 27,500	\$ -	\$ 27,500	
2020-1057-BOD-05-26-20	Desert Cancer Foundation - Patient Assistance Program	\$ 150,000		\$ 82,500	\$ -	\$ 82,500	
2020-1124-BOD-06-23-20	Regents of UCR - COVID-19 Testing & Health Education for Eastern Valley - 5 Months	\$ 149,976		\$ 149,976	\$ 149,976	\$ -	
2020-1134-BOD-07-28-20	1 Desert Healthcare Foundation - Addressing Healthcare Needs of Black Communities		\$ 500,000	\$ 500,000	\$ 500,000	\$ -	
2020-1139-BOD-09-22-20	1 CSU San Bernardino Palm Desert Campus Street Medicine Program - 1 Yr		\$ 50,000	\$ 50,000	\$ 22,500	\$ 27,500	
2020-1135-BOD-11-24-20	5 Hope Through Housing Foundation - Family Resilience - 1 Yr		\$ 20,000	\$ 20,000		\$ 20,000	
<b>TOTAL GRANTS</b>		<b>\$ 13,106,979</b>	<b>\$ 570,000</b>	<b>\$ 10,318,358</b>	<b>\$ 1,303,637</b>	<b>\$ 8,985,816</b>	
<b>Amts available/remaining for Grant/Programs - FY 2020-21:</b>							
<b>Amount budgeted 2020-2021</b>			\$ 4,000,000		G/L Balance:	<b>11/30/2020</b>	
<b>Amount granted through November 30, 2020:</b>			\$ (570,000)		2131	\$ 2,325,816	
Mini Grants:	1132		\$ (5,000)		2281	\$ 6,660,000	
Financial Audits of Non-Profits	8/15/20		\$ (5,000)				
Net adj - Grants not used:	1021		\$ 28,905		<b>Total</b>	<b>\$ 8,985,816</b>	
Matching external grant contributions			\$ -			\$ (0)	
<b>Balance available for Grants/Programs</b>			<b>\$ 3,448,905</b>				
<b>Strategic Focus Areas FY20-21:</b>							
		<b>Grant Budget</b>	<b>Granted YTD</b>	<b>Available</b>			
1	Healthcare Infrastructure and Services	\$ 1,500,000	\$ (521,240)	\$ 978,760			
2	Behavioral Health/Mental Health	\$ 500,000		\$ 500,000			
3	Homelessness	\$ 500,000	\$ 145	\$ 500,145			
4	Vital Human Services to People with Chronic Conditions	\$ 1,000,000		\$ 1,000,000			
5	Economic Protection, Recovery and Food Security	\$ 500,000	\$ (30,000)	\$ 470,000			
<b>Balance available for Grants/Programs</b>		<b>\$ 4,000,000</b>	<b>\$ (551,095)</b>	<b>\$ 3,448,905</b>			



**Date:** 12/08/2020

**To:** Program Committee

**Subject:** Grant # 1149 Voices For Children

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**Grant Request:** Court Appointed Special Advocate (CASA) Program

**Amount Requested:** \$40,000.00

**Project Period:** 1/1/2021 to 12/31/2021

**Project Description and Use of District Funds:**

VFC aligns with the DHCD's focus on healthcare infrastructure and services. Through the CASA program, VFC will increase access to healthcare for children in foster care. According to the American Academy of Pediatrics, children entering foster care are more likely to have unaddressed health challenges: approximately 50% have chronic physical health issues, approximately 10% are medically fragile, and many have a history of prenatal substance exposure. Once they enter the foster system, it is common for children to change placements often, which can lead to gaps in consistent healthcare services.

CASAs ensure that the health needs of foster youth are not overlooked. They review a child's medical records, communicate with health professionals, and track a child's health needs, medications, and medical referrals. When case children spend time in emergency housing placements, CASAs ensure that caregivers and housing programs receive vital information about a child's medications, allergies, and health risks. CASAs can coordinate or provide transportation to medical appointments for a child. When CASAs determine that children are unable to access healthcare services, they advocate for solutions by sharing concerns with the social worker and advocating in court. At each regularly scheduled court hearing, CASAs submit formal, written reports about the ability of a child to access preventive, specialty, and mental health care.

Since March 2020, the Stay-at-Home order, social distancing guidelines, and school closures have created new barriers to healthcare and increased health needs. The critical role that CASAs play in ensuring that foster youth receive the healthcare services they need has only increased with the onset of the COVID-19 pandemic. The organizational cost of providing one child with a CASA volunteer for a year is \$2,000. A



\$40,000 grant from Desert Healthcare District would provide CASAs to 20 Coachella Valley foster youth and ensure their healthcare needs are addressed.

**Strategic Plan Alignment:**

Healthcare Infrastructure and Services / Increase access to healthcare for traditionally underserved populations

**Geographic Area(s) Served:**

Cathedral City; Coachella; Indio; Indian Wells; La Quinta; Oasis; Palm Desert; Palm Springs; Thermal; Bermuda Dunes

**Action by Program Committee: (Please select one)**

- Full recommendation and forward to the Board for consideration with the Committee's recommendation that a grant amount of \$40,000.00 be approved.
- Recommendation with modifications
- Deny



## Full Grant Application Summary

### Voices For Children, Grant #1149

#### About the Organization

Voices For Children  
 PO Box 7219  
 CA, Riverside 92513  
 Tel:  
<http://www.speakupnow.org>

#### **Primary Contact:**

Jessica Munoz  
 Tel: (951) 357-9100  
[JessicaM@speakupnow.org](mailto:JessicaM@speakupnow.org)

#### Historical (approved Requests)

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
2018	Court Appointed Special Advocate (CASA) Program – Coachella Valley	\$24,000	Grant	6/4/2019	

#### Program/Project Information

**Project Title:** Court Appointed Special Advocate (CASA) Program

**Start Date:** 1/1/2021 **End Date:** 12/31/2021

**Term:** 12 months

**Total Project Budget:** \$997,423

**Requested Amount:** \$40,000

#### **Executive Summary:**

This year, approximately 4,000 children will spend time in Riverside County foster care after experiencing abuse and neglect. Voices for Children (VFC) fills a critical service gap by providing children in foster care with individual attention and advocacy to ensure that their needs do not slip through the cracks of an overburdened system. This year, VFC's Riverside County Court Appointed Special Advocate (CASA) program will provide advocacy and support to 450 children.

VFC serves children in foster care ages birth-21. The children enrolled in VFC's program are 46% female and 54% male. They are comprised of the following races and ethnicities: 46% Hispanic, 29% Caucasian, 20% Black, 3% Native American/Alaskan, 1% Asian/Pacific Islander, and 1% other ethnicities. Children in foster care are more likely to have mental and physical health conditions including anxiety, depression,

learning disabilities, asthma, and speech, hearing, and vision problems when compared to the general population (Turney and Wildeman, Mental and Physical Health of Children in Foster Care, 2016).

CASAs are carefully screened and trained before being assigned to the case of a child or sibling group. They commit to their role for a minimum of 18 months. CASAs travel throughout the county to visit their case children and spend 10-15 hours a month learning about their situation from health care professionals, teachers, and others. Twice a year, CASAs appear in court and prepare reports for the judge about the status of children and their progress in the areas of mental and physical health, education and early childhood development, and housing. Judges depend on information provided by CASAs as they make life-altering decisions on behalf of a child.

CASAs fill a crucial gap by providing youth with advocacy and a consistent adult presence. With a CASA by their side, foster youth are better equipped to overcome obstacles and reach their potential. VFC's program has far reaching effects on the lives of individual children and the broader community since foster youth with CASAs are less likely to require public assistance or be incarcerated later in life.

The Riverside County CASA program will serve 80 foster children in the Coachella Valley during calendar year 2021. The organizational cost of recruiting, training, and supervising a CASA volunteer for a year is \$2,000. We are requesting \$40,000 from Desert Healthcare District to provide a CASA to 20 Coachella Valley children to ensure that their healthcare and other needs are addressed.

### **Program/project Background and Community Need:**

During the grant period, VFC's CASA Program will ensure that a minimum of 80 Coachella Valley children residing within the DHCD boundaries receive access to services that address their physical and mental health and developmental needs through the advocacy of a CASA volunteer.

Each child who enters the foster care system has experienced one or more adverse childhood experiences (ACES), and research shows that they are significantly more likely to have multiple ACES than their peers (Turney and Wildeman, 2017). ACES have long-term health effects, which can include chronic illness, cancer, diabetes, heart disease, mental illness, and a shorter life expectancy. Research from the Centers for Disease Control shows that having one secure and supportive relationship can promote adaptive responses to trauma and healthy childhood development. VFC recognizes that foster children encounter a revolving door of caregivers and childhood welfare professionals. CASAs form enduring relationships with youth and provide them with consistent support. CASAs advocate for children and provide them with access to resources that address their past trauma and unmet needs. They gain a holistic understanding of a child's situation and provide the court with unbiased information which helps judges to make critical decisions about a child's future.

**Strategic Plan Alignment:**  
Healthcare Infrastructure and Services

**Program/project description:**

VFC aligns with the DHCD's focus on healthcare infrastructure and services. Through the CASA program, VFC will increase access to healthcare for children in foster care. According to the American Academy of Pediatrics, children entering foster care are more likely to have unaddressed health challenges: approximately 50% have chronic physical health issues, approximately 10% are medically fragile, and many have a history of prenatal substance exposure. Once they enter the foster system, it is common for children to change placements often, which can lead to gaps in consistent healthcare services.

CASAs ensure that the health needs of foster youth are not overlooked. They review a child's medical records, communicate with health professionals, and track a child's health needs, medications, and medical referrals. When case children spend time in emergency housing placements, CASAs ensure that caregivers and housing programs receive vital information about a child's medications, allergies, and health risks. CASAs can coordinate or provide transportation to medical appointments for a child. When CASAs determine that children are unable to access healthcare services, they advocate for solutions by sharing concerns with the social worker and advocating in court. At each regularly scheduled court hearing, CASAs submit formal, written reports about the ability of a child to access preventive, specialty, and mental health care.

Since March 2020, the Stay-at-Home order, social distancing guidelines, and school closures have created new barriers to healthcare and increased health needs. The critical role that CASAs play in ensuring that foster youth receive the healthcare services they need has only increased with the onset of the COVID-19 pandemic. The organizational cost of providing one child with a CASA volunteer for a year is \$2,000. A \$40,000 grant from Desert Healthcare District would provide CASAs to 20 Coachella Valley foster youth and ensure their healthcare needs are addressed.

**Description of the target population (s):**

The project will serve Coachella Valley foster children ages 0-21 who have experienced abuse and neglect. The children we serve are 46% female and 54% male. Forty-six percent are Hispanic, 29% Caucasian, 20% Black, 3% Native American/Alaskan, 1% Asian/Pacific Islander, and 1% are from other ethnicities.

**Geographic Area(s) Served:**

Cathedral City; Coachella; Indio; Indian Wells; La Quinta; Oasis; Palm Desert; Palm Springs; Thermal; Bermuda Dunes

**Age Group:**

- (0-5) Infants
- (06-17) Children
- (18-24) Youth

**Total Number of District Residents Served:**

20

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b>                  By December 31, 2021, Voices for Children (VFC) Court Appointed Special Advocates (CASAs) will advocate for 20 youth in the foster care system within the Desert Healthcare District boundaries.</p> <p>CASAs will maintain monthly contact with the case children they serve, provide monthly case updates to their VFC staff Advocacy Supervisors, and submit formal court reports at least twice a year making key recommendations to the judge about the physical and mental health, educational and developmental, and other needs of the child. The court report requires CASAs to address the child’s exams and immunizations, medication, and therapy. For children 10 and older, CASAs must confirm that the child has received the requisite reproductive and sexual health education and been informed of their right to access and receive confidential medical care.</p>	<p><b>Evaluation #1:</b>                  VFC will use our internal database, CASA Manager, to track program activities. Director of Programs, Sharon Morris, VFC will use our internal database, CASA Manager, to track program activities. Director of Programs, Sharon Morris, and Program Coordinator, Julie Woodruff, will monitor the number of Coachella Valley youth referred to VFC on a monthly basis. During case intake, they will assess the needs of each child and match them with a CASA volunteer.</p> <p>VFC staff will record monthly case updates in CASA Manager. CASA Manager will also be used to track upcoming court hearings and court reports submitted. VFC will consider this goal accomplished if 20 Coachella Valley foster youth receive the individual attention and advocacy of a CASA during the grant period.</p>
<p><b>Goal #2:</b>                  By December 31, 2021, VFC’s Riverside County CASA program will recruit at least 20 new prospective CASA volunteers.</p> <p>In order to meet our goal of providing advocacy to 20 youth, VFC needs to recruit new CASA volunteers in addition to the current CASAs who are already serving. VFC will achieve this goal by hosting 2-3 CASA virtual or in-person volunteer information sessions each month and presenting to local community groups who</p>	<p><b>Evaluation #2:</b>                  VFC’s Director of Programs, Sharon Morris, and Program Coordinator, Julie Woodruff, will monitor the number of prospective volunteers who attend information sessions and other recruitment events each month and enroll in Advocate University, VFC’s internal CASA training program. On a monthly basis, Sharon will meet with our staff recruitment committee to review progress toward the annual goal and adjust outreach strategies as needed. We will consider this objective accomplished if 20</p>

<p>are interested in volunteerism.</p>	<p>individuals enroll in Advocate University during the grant period.</p>
<p><b>Goal #3:</b> By December 31, 2021, VFC’s Riverside County CASA program will train and match at least 20 new CASA volunteers to youth living in the foster care system.</p> <p>We will hold 8 sessions of Advocate University during the grant period. Training requirements include 35 hours of classroom learning, two interviews, and a practice court report writing assignment. Trainees also prepare for their first court appearance by reviewing simulated court hearings. All classroom learning is currently being conducted virtually. Trainees are matched with a single child or sibling group for ongoing advocacy within 1-3 weeks of completing all training requirements.</p>	<p><b>Evaluation #3:</b> VFC’s Director of Programs, Sharon Morris, and Program Coordinator, Julie Woodruff, will track the progress of each CASA trainee in CASA Manager as they complete training requirements. We will consider this objective accomplished if 20 new CASAs complete training requirements and are assigned to advocate on behalf of a single child or sibling group from the Coachella Valley.</p>
<p><b>Goal #4:</b></p>	<p><b>Evaluation #4:</b></p>
<p><b>Goal #5:</b></p>	<p><b>Evaluation #5:</b></p>

**Proposed Program / Project Evaluation Plan**

VFC will monitor and track our progress on the program goals outlined above using CASA Manager, a database platform developed for CASA programs. CASA Manager allows VFC to gather and monitor qualitative and quantitative information about each child as they progress through the dependency system, including their demographic information, removal zip code, mental and physical health needs, educational progress, and foster care placement. On a weekly basis, Advocacy Supervisors meet with their manager to review their cases and develop strategies to support each child. CASAs provide their staff Advocacy Supervisor monthly updates about the status of their case child, which are recorded in CASA Manager. At six-month intervals, CASAs collaborate with their Advocacy Supervisor to develop a detailed, written court report in which they comment on each child’s progress and highlight areas of unmet need that should be addressed. Staff also use CASA Manager to track each CASA volunteer’s progress completing initial training requirements, monthly contacts with their supervisor, and continuing education activities. Each month, Advocacy Supervisors document at least one “program impact,” which is a description of a successful case-related outcome. These program impacts add to the qualitative data available. VFC’s program leaders will aggregate and review program quantitative data quarterly to ensure that we are on track to achieve each program goal outlined above.

## **Organizational Capacity and Sustainability**

### **Organizational Capacity**

VFC's Riverside County CASA program is led by Executive Director Jessica Muñoz. The CASA program model is incredibly efficient. Our program staff of ten oversee the recruitment, training, and supervision of more than 300 CASA volunteers annually. VFC is the only organization in Riverside County that is authorized by the Court to recruit, train, and support CASA volunteers, demonstrating our credibility within the community and the capacity we have to serve children.

The Riverside County CASA program has achieved year-over-year growth since its inception in 2014. We provided 434 children with a CASA during fiscal year 2019-20, our fifth year of operation. VFC's Riverside County CASA program was created at the urging of the Judicial Council of California and the Superior Court in Riverside County. When previous program in Riverside County closed its doors in 2014, there were disastrous consequences for the health, well-being, permanent home prospects, and education of thousands of local foster children including children from the Coachella Valley. Their needs were at high risk of going undetected and unaddressed. VFC was asked to step in to establish a new CASA program in Riverside County based on our organizational capacity and 40 years of programmatic and fundraising success.

### **Organizational Sustainability:**

Voices for Children is an organization with a singular mission: to transform the lives of children who have experienced abuse and neglect by providing them with CASA volunteers. As a result, all of our strategic and fundraising initiatives are conceived in service of this overarching goal. VFC receives strategic and fundraising support from our 27-member board of directors and our Riverside County Community Advisory Council. The majority of VFC's funding comes from private philanthropy. We solicit support through grant requests, direct mail campaigns, third-party events, and major gift solicitations. We have received significant grants from funders such as the Annenberg Foundation, the Berger Foundation, United Way of the Inland Valleys, Focusing Philanthropy, and the In-N-Out Burger Foundation. We also receive government funding through the Victims of Crime Act, local Community Development Block Grant (CDBG) programs, and the Riverside County Transportation Commission. VFC's philanthropy professionals work to increase funding by cultivating new donors and broadening our network in the communities we serve. VFC's Riverside County CASA program aims to strengthen philanthropic partnerships, especially with individuals, corporations, and foundations, to ensure the sustainability of the CASA program.

### **Partnerships:**

#### **Key Partners:**

Voices for Children collaborates with many institutions, organizations, agencies, and government offices in Riverside County to serve foster children. We work most closely with the Riverside County Department of Public Social Services (DPSS) and Juvenile Dependency Court. Riverside County judges, attorneys, social workers, and other child

welfare professionals refer children to our program. We also collaborate with attorneys and social workers as we work to address the unmet needs of the youth we serve. Other partners in service include the Riverside County Department of Probation, Riverside County Tribal Alliance, the Department of Public Social Services' System Improvement Core, the Riverside County Office of Education, and local school districts, foster family agencies, and mental health providers.

Each Superior Court may designate one nonprofit agency to serve as the CASA program for its county. Voices for Children is the organization designated by the Superior Court of California, County of Riverside's Juvenile Division to serve in this capacity. The first MOU was executed in January 2015. The present MOU will be in effect until December 2020, at which point it will be renewed. At the time of this writing, this process has already begun. The MOU is typically executed for two-year terms and is reviewed annually to ensure compliance with state and local rules.

## Line Item Budget Operational Costs

PROGRAM OPERATIONS	Total Program/Project Budget	Funds from Other Sources <span style="color: red;">Detail on sheet 3</span>	Amount Requested from DHCD
<b>Total Staffing Costs</b> <span style="color: red;">Detail on sheet 2</span>	\$766,453	\$726,453	\$40,000
<b>Equipment (itemize)</b>			
1	0		0
2			0
3			0
4			0
<b>Supplies (itemize)</b>			
1	Office Supplies	8,000	8,000
2	Dues, Fees, and Subscriptions	1,200	1,200
3			0
4			0
<b>Printing/Duplication</b>		1,200	1,200
<b>Mailing/Postage</b>		1,200	1,200
<b>Travel/Mileage</b>		108,000	108,000
<b>Education/Training</b>		3,000	3,000
<b>Office/Rent/Mortgage</b>		24,750	24,750
<b>Telephone/Fax/Internet</b>		11,220	11,220
<b>Utilities</b>			0
<b>Insurance</b>		12,000	12,000
<b>Other facility costs not described above (itemize)</b>			
1			0
2			0
3			0
4			0
<b>Other program costs not described above (itemize)</b>			
1	Credit card fees	144	144
2	Marketing (includes recruitment)	39,200	39,200
3	Other expenses	21,056	21,056
4			0
<b>Total Program Budget</b>		<b>997423</b>	<b>957423</b>
			<b>40000</b>
<b>Budget Narrative</b>	<p>The majority of our operational costs consist of mileage and marketing (volunteer recruitment). Our organization is powered by volunteers who are dispersed throughout the County. We budgeted \$108,000 this year on mileage reimbursement. We strive for operational efficiency by matching volunteers with children in their geographical region, but we cannot guarantee that a child will remain in the same placement. Foster children change placements frequently, so volunteers often drive extensive distances to spend time with their case child and to attend school and team meetings. Thankfully, the Riverside County Transportation Commission provides Voices for Children with a grant that covers an estimated 80% of our mileage expenses. Because our organization relies heavily on the services of volunteers, we budgeted \$39,200 on marketing/volunteer recruitment. This includes the production of informational and promotional materials, newsletters and fliers, and subscriptions and advertisements through online platforms such as VolunteerMatch, Indeed, Mentor Connection, JustServe, AllForGood, Idealist, LinkedIn, and Meetup.com.</p>		



**Line Item Budget  
Staffing Costs**

<b>Staff Salaries</b>		<b>Annual Salary</b>	<b>% of Time Allocated to Program</b>	<b>Actual Program Salary</b>	<b>Amount of Salary Paid by DHCD Grant</b>
<b>Employee Position/Title</b>					
1	Executive Director	115,000	50	57,500	11500
2	Director of Philanthropy	85,280	20	17,056	0
3	Director of Programs	65,000	100	65,000	6500
4	Assistant Program Manager	54,080	100	54,080	0
5	Assistant Program Manager	54,080	100	54,080	8100
6	Advocacy Supervisor	43,900	100	4,900	
7	Advocacy Supervisor	42,993	100	42,993	
8	Advocacy Supervisor	42,993	100	42,993	
9	Advocacy Supervisor	42,993	100	42,993	
10	Advocacy Supervisor	42,091	100	42,091	8486
11	Program Coordinator (.5 FTE)	22,880	100	22,880	5414
12	Flat rate for finance, grant, human resources, and marketing support from San Diego branch	72,000			
<b>Total Employee Benefits, Taxes, and Workers Compensation</b>		83,163			
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt;</b>	<b>40000</b>
<b>Budget Narrative</b>	<ul style="list-style-type: none"> <li>o The Executive Director provides program oversight, including volunteer recruitment, retention, recognition, and training efforts. She also facilitates professional development for program staff and provides guidance on challenging cases.</li> <li>o The Director of Programs oversees all program staff, case management, and training and recruitment efforts. Each year, she facilitates at least seven sessions of Advocate University, VFC's 35-hour internal CASA training program.</li> <li>o The Assistant Program Manager (APM) is based in VFC's Palm Desert office. In addition to managing a caseload of approximately 30 CASA volunteers, she oversees an Advocacy Supervisor who is also based in VFC's Palm Desert office. The APM also assesses and recommends program policies, gathers child welfare resources, and attends community meetings that offer opportunities to engage prospective volunteers.</li> <li>o The Advocacy Supervisor (AS) is based in VFC's Palm Desert office and manages a team of 50-55 CASA volunteers. The Advocacy Supervisor provides ongoing training, support, and accountability to CASA volunteers and assists them in preparing formal written court reports twice a year at a minimum.</li> </ul>				
<b>Budget Narrative</b>	Employee benefits (\$30,750), payroll taxes (\$46,728), and worker's compensation (\$5,685) are included in the staffing costs calculation. Benefits are calculated at a rate of 5.03% of Riverside County staff salaries (not all employees opt into healthcare and dental benefits). Payroll taxes are calculated at a rate of 7.65% (6.2% Social Security + 1.45% Medicare). Worker's compensation is calculated at a rate of .93%.				
<b>Professional Services / Consultants</b>		<b>Hourly Rate</b>	<b>Hours/Week</b>	<b>Monthly Fee</b>	<b>Fees Paid by DHCD Grant</b>
<b>Company and Staff Title</b>					
1					
2					
3					
4					
5					
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt;</b>	<b>0</b>
<b>Budget Narrative</b>	VFC does not use professional services or consultants.				

## Line Item Budget Other Program Funds

Other funding received (actual or projected) SPECIFIC to this program/project		Amount
<b>Fees</b>		\$0
<b>Donations</b>		\$233,220
<b>Grants (List Organizations)</b>		
1	Cal OES	\$167,432
2	Riverside County Transportation Commission	\$121,486
3	County of Riverside CDBG Program	\$55,000
4	City of Moreno Valley CDBG Program	\$30,000
4	H.N. and Frances C. Berger Foundation	\$25,000
5	Inland Southern United Way Coalition	\$23,200
7	In-N-Out Burger Foundation	\$20,000
8	Anderson Children's Foundation	\$14,000
9	City of Riverside CDBG Program	\$10,000
10	City of Hemet CDBG Program	\$10,000
11	U.S. Bank	\$10,000
12	San Manuel Band of Mission Indians	\$10,000
13	City of Temecula CDBG Program	\$5,538
14	Mechanics Bank	\$5,000
14	County of Riverside Board of Supervisors	\$4,000
15	Other Planned Foundation and Government Grants	\$187,344
<b>Fundraising (describe nature of fundraiser)</b>		
1	Business Network International (BNI) Virtual Auction Third Party Event	\$8,000
2		
<b>Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)</b>		
1	Corporations	\$62,910
2		
3		
4		
<b>Total funding in addition to DHCD request</b>		<b>\$1,002,130</b>
<b>Budget Narrative</b>	The donations listed in cell D3 are the total individual and corporate gifts received year to date. The grants listed in cells D5 through D14 are the total awarded year to date. The amount listed in cell D15 is the total VFC plans to secure through pending and planned grant requests. The amount listed in cell D23 represents the total VFC plans to raise through corporate partnerships.	

**INTERAGENCY AGREEMENT BETWEEN SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO, AND VOICES FOR CHILDREN, INC.**

This Interagency Agreement ("**Agreement**") is made and entered into between the Superior Court of California, County of San Diego ("**Court**"), and Voices for Children (VFC) (collectively, "**Parties**," and individually, "**Party**") to receive and provide the specific services stated herein.

**ARTICLE 1  
TERM AND EFFECTIVE DATE**

1.0 This Agreement shall be effective January 1, 2019 through December 31, 2020.

**ARTICLE 2  
INDEPENDENT CONTRACTOR**

2.0 This Agreement in no way establishes a permanent and ongoing relationship between the parties. Nothing in this Agreement shall be construed as creating any partnership, joint venture, association, any employer-employee, or principal-agent relationship among or between any of the parties. Court Appointed Special Advocate (CASA) volunteers are not employees of the Court. CASA volunteers are defined by California Rule of Court, Rule 5.655 ("CRC 5.655"), attached as Attachment A and incorporated herein by reference.

**ARTICLE 3  
COURT AND VOICES FOR CHILDREN OBLIGATIONS**

3.0 The parties agree to perform the terms of this Agreement in accordance with CRC 5.655. It is the intent of the parties that this Agreement be administered in its entirety in good faith during the full term of this Agreement.

3.1 CRC 5.655 imposes obligations on the Court and Voices for Children to develop and implement written plans and procedures pertaining to 1) the selection of cases and appointment of CASA volunteers for children in juvenile court proceedings, 2) the training, oversight, support and supervision of CASA volunteers in the performance of their duties, and 3) the confidentiality of case information, case records, and personnel records. The written plans and procedures, approved by the Presiding Juvenile Court Judge pursuant to CRC 5.655, are attached hereto as Attachment B and incorporated herein by reference.

3.2 Voices for Children shall comply with Court rules and restrictions relating to facility usage and access and the use and access to Court staff.

3.3 Access to juvenile case file and nonminor dependent court file information is governed by: Local Rule 6.6.4, Order Authorizing Voices for Children to Access Dependents' and Wards' Files, Including Electronic Records (attached hereto as Attachment C), Order Authorizing Electronic Access to Juvenile Dependency Case Management System ("JDEP Order") (Attachment D), Agreement between Voices for Children and the Court, Court Agreement No. CH4423-13 (Exhibit B to JDEP Order) and the 2014 Amendment to that Agreement (Exhibit A to JDEP Order). These documents are incorporated herein and made a part of this Agreement.

**ARTICLE 4  
TERMINATION**

- 4.0 Either party may terminate this Agreement, with or without cause, by giving thirty (30) days written notification to the other party.
- 4.1 Nothing in this Agreement shall limit the authority of the Court to make changes required to provide mandated services as required by law, statute and/or court rule. If any change made by either party significantly affects the rights or responsibilities of the other party, the party making the change shall notify the other party in writing as soon as practical. If the parties are unable to resolve the matter, then either party may terminate the Agreement on thirty (30) days written notice to the other.

**ARTICLE 5  
MISCELLANEOUS PROVISIONS**

- 5.0 **INSURANCE.** Voices for Children shall maintain insurance coverage for its staff and volunteers as stated in CRC 5.655.
- 5.1 **INDEMNIFICATION.** Voices for Children will defend, indemnify and hold harmless the Court, and its respective officers, judicial officers, administrators, employees and agents from and against any and all claims, losses, and expenses, including attorney's fees and costs, that arise out of or in connection with (i) an act or omission, or alleged act or omission, of Voices for Children, its officers, directors, employees, agents, volunteers, subcontractors or representatives in connection with or related to the performance of this Agreement, (ii) a breach of a representation, warranty, or other provision of this Agreement, and/or (iii) any claim with respect to the unlawful or unauthorized use or disclosure of confidential information, including but not limited to case information, case records and personnel records. This indemnity will survive the expiration or termination of this Agreement. Voices for Children shall not make any admission of liability or other statement on behalf of an indemnified party or enter into any settlement or other agreement which would bind an indemnified party, without the Court's prior written consent, which consent shall not be unreasonably withheld. The Court shall have the right, at its option and expense, to participate in the defense and/or settlement of a claim through counsel of its own choosing. Voices for Children's duties of indemnification exclude indemnifying a party for that portion of losses and expenses that are finally determined by a reviewing court to have arisen out of the sole negligence or willful misconduct of the indemnified party.

The specified insurance limits required of Voices for Children, as stated in Article 4.0, shall in no way limit or circumscribe Voices for Children's obligations to indemnify and hold harmless the Court from third party claims.

- 5.2 **ASSIGNMENT.** Neither party shall assign or subcontract any interest in this Agreement without the prior written consent of the other party. Any assignment or subcontract made in contravention of the foregoing shall be void and of no effect.
- 5.3 **AMENDMENT AND WAIVER.** No modification or change to this Agreement shall be valid without written approval, from both parties, in the form of an Amendment signed by the authorized representative of each party. For the Court, the Executive Officer is the only such authorized representative. A waiver of enforcement of any of this Agreement's terms or conditions by the parties is effective only if expressly agreed in writing by the authorized representative or each party (for the Court, its Executive Officer). Any waiver or failure to enforce any provision of this Agreement on one occasion will not be deemed a waiver of any other provision or of such provision on any other occasion.
- 5.4 **TIME OF PERFORMANCE.** Unless stated otherwise, all references to days shall be calendar days.

5.5 NOTICE. All notices, claims, correspondence, and reports required by this Agreement shall be addressed as follows:

**Court**

Superior Court of California, County of San Diego  
Executive Officer  
1100 Union Street  
San Diego, CA 92101

**Voices for Children**

Voices for Children, Inc.  
2851 Meadow Lark Drive  
San Diego, CA 92123

5.6 COMPLETE AGREEMENT. This Agreement is intended by the parties as a final expression of their understanding with respect to the subject matter hereof and as a complete and exclusive statement of the terms and conditions thereof and supersedes

5.7 COMPLIANCE WITH LAWS. The parties agree to comply with all applicable laws, rules, and regulations in the performance of their duties.

5.8 CHOICE OF LAW. This Agreement will be exclusively governed by the laws of the State of California without regard to its choice-of-law provisions.

5.9 JURISDICTION AND VENUE. The jurisdiction and venue of the state and federal courts will be located in San Diego, California in any legal action concerning or relating to this Agreement.

5.10 DEFAULT AND REMEDIES. A default exists under this Agreement if Voices for Children fails to perform a material promise in this agreement and is incapable of curing this failure or does not cure failure within thirty (30) days following notice. Voices for Children will notify Court immediately if Voices for Children defaults under this Agreement, or if a third party claim or dispute is brought or threatened that alleges facts that would constitute a default under this Agreement..

Parties may do any of the following: a) Enter non-binding mediation or b) terminate agreement as stated in Article 4.0, or c) seek other remedies at law or in equity. All remedies provided for in this Agreement may be exercised individually or in combination with any other available remedy.

5.11 DISPUTE RESOLUTION. Except as otherwise provided in this agreement, any dispute concerning a question of fact arising under this agreement, which is not disposed by this agreement, and not resolved by negotiations, may be resolved by mutual consent of both parties in non-binding mediation ("**mediation**") in the City of San Diego, California.


5.12 ATTORNEY FEES. If any action at law or in equity is necessary to enforce the terms of this Agreement, the prevailing party shall be entitled to reasonable attorney's fees and reasonable costs, in addition to any other relief to which such party may be entitled.

5.13 LIMITATIONS OF LIABILITY. Court will not be liable to Voices for Children for any indirect, special, or consequential damages, arising from or relating to this agreement, regardless if the Court was advised of the possibility of such loss or damage.

5.14 CONFLICTS OF INTEREST. The parties and their respective employees or agents shall have no interest, and shall not acquire any interest, direct or indirect, which shall conflict in any manner or degree with the performance of services under this agreement.

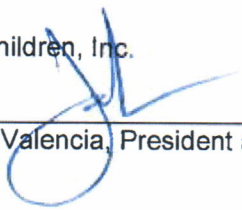
IN WITNESS WHEREOF, the parties have executed this Agreement in San Diego, California.

**SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO**

By:   
Michael Roddy, Court Executive Officer

Date: 11-7-18

Voices for Children, Inc.

By:   
Name: John Valencia, President and CEO

Date: 11/5/18

**ATTACHMENT A**



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## 2018 California Rules of Court

### Rule 5.655. Program requirements for Court Appointed Special Advocate programs

#### (a) General provisions

A Court Appointed Special Advocate (CASA) program must comply with this rule to be eligible to receive Judicial Council funding. The Judicial Council may consider compliance with the guidelines delineated in the *CASA Program Policies and Procedures Manual* when determining eligibility for and amount of program funding.

(Subd (a) adopted effective January 1, 2005.)

#### (b) Definitions

- (1) A CASA program is the local child advocate program that adheres to this rule; has been designated by the local presiding juvenile court judge to recruit, screen, select, train, supervise, and support lay volunteers for appointment by the court to help define the best interest of children in juvenile court dependency and wardship proceedings; and has completed one development grant year and one "start-up" year.
- (2) Judicial Council staff may create a *CASA Program Policies and Procedures Manual* containing recommended program policies and procedures. If Judicial Council staff create a manual, it will be developed in collaboration with the California CASA Association and California CASA program directors. The protocols will address program and fiscal management, and the recruitment, screening, selection, training, and supervision of lay volunteers.
- (3) A CASA volunteer is a person who has been recruited, screened, selected, and trained, who is being supervised and supported by a local CASA program, and who has been appointed by the juvenile court as a sworn officer of the court to help define the best interest of a child or children in juvenile court dependency and wardship proceedings.
- (4) A "dependency proceeding" is a legal action brought on behalf of an allegedly abused, neglected, or abandoned child under section 300 et seq. The action is designed to protect children, preserve and reunify families, and find permanent homes for children who cannot be returned to their parents. Dependency proceedings include actions to appoint a legal guardian, terminate parental rights, and facilitate adoptions for dependent children of the juvenile court.
- (5) A "wardship proceeding" is a legal action involving a child under the age of 18 years who is alleged to be:
  - (A) A person described under section 601 (who is beyond parental control or habitually disobedient or truant); or
  - (B) A person described under section 602 (who has violated any state or federal law or any city or county ordinance).

(Subd (b) amended effective January 1, 2016; adopted as subd (a); previously amended and relettered as subd (b) effective January 1, 2005; previously amended effective January 1, 2007.)

#### (c) Recruiting, screening, and selecting CASA volunteers

- (1) A CASA program must adopt and adhere to a written plan for the recruitment of potential CASA volunteers. The program staff, in its recruitment effort, must address the demographics of the jurisdiction by making all reasonable efforts to ensure that individuals representing all racial, ethnic, linguistic, and economic sectors of the community are recruited and made available for appointment as CASA volunteers.
- (2) A CASA program must adopt and adhere to the following minimum written procedures for screening potential CASA volunteers under section 102(e):
  - (A) A written application that generates minimum identifying data; information regarding the applicant's education, training, and experience; minimum age requirements; and current and past employment.
  - (B) Notice to the applicant that a formal security check will be made, including inquiries through appropriate law enforcement agencies, regarding any criminal record, driving record, or other record of conduct that would disqualify the applicant from service as a CASA volunteer. The security check must include fingerprinting. Refusal to consent to a formal security check is grounds for rejecting an applicant.
  - (C) A minimum of three completed references regarding the character, competence, and reliability of the applicant and his or her suitability for assuming the role of a CASA volunteer.
  - (D) A personal interview or interviews by a person or persons approved by the presiding juvenile court judge or designee, to probe the essential areas of concern with respect to the qualities of an effective CASA volunteer. A written, confidential record of the interview and the interviewer's assessments and observations must be made and retained in the advocate's file.



- (3) If a CASA program allows its volunteers to transport children, the program must ensure that each volunteer transporting children:
  - (A) Possesses a valid and current driver's license;
  - (B) Possesses personal automobile insurance that meets the minimum state personal automobile insurance requirements;
  - (C) Obtains permission from the child's guardian or custodial agency; and
  - (D) Provides the CASA program with a Department of Motor Vehicles driving record report annually.
- (4) A CASA program must adopt a written preliminary procedure for selecting CASA candidates to enter the CASA training program. The selection procedure must state that any applicant found to have been convicted of or to have current charges pending for a felony or misdemeanor involving a sex offense, child abuse, or child neglect must not be accepted as a CASA volunteer. This policy must be stated on the volunteer application form.
- (5) An adult otherwise qualified to act as a CASA must not be discriminated against based on marital status, socioeconomic factors, race, national origin, ethnic group identification, religion, age, sex, sexual orientation, color, or disability or because of any other characteristic listed or defined in Government Code section 11135 or Welfare and Institutions Code section 103.

*(Subd (c) amended effective January 1, 2010; adopted as subd (b); previously amended effective January 1, 1995, and January 1, 2007; previously amended and relettered effective January 1, 2005.)*

#### **(d) Initial training of CASA volunteers (§ 102(d))**

A CASA program must adopt and adhere to a written plan for the initial training of CASA volunteers.

- (1) The initial training curriculum must include at least 30 hours of formal instruction. This curriculum must include mandatory training topics as listed in section 102(d). The curriculum may also include additional appropriate topics.
- (2) The final selection process is contingent on the successful completion of the initial training program, as determined by the presiding judge of the juvenile court or designee.

*(Subd (d) amended effective January 1, 2007; adopted as subd (c); previously amended effective January 1, 1995; previously amended and relettered effective January 1, 2005.)*

#### **(e) Oath**

At the completion of training, and before assignment to any child's case, the CASA volunteer must take a court-administered oath describing the duties and responsibilities of the advocate under section 103(f). The CASA volunteer must also sign a written affirmation of that oath. The signed affirmation must be retained in the volunteer's file.

*(Subd (e) amended effective January 1, 2007; adopted as subd (d); previously amended and relettered effective January 1, 2005.)*

#### **(f) Duties and responsibilities**

CASA volunteers serve at the discretion of the court having jurisdiction over the proceeding in which the volunteer has been appointed. A CASA volunteer is an officer of the court and is bound by all court rules under section 103(e). A CASA program must develop and adopt a written description of duties and responsibilities, consistent with local court rules.

*(Subd (f) amended effective January 1, 2007; adopted as subd (e); previously amended effective January 1, 1995; previously amended and relettered effective January 1, 2005.)*

#### **(g) Prohibited activities**

A CASA program must develop and adopt a written description of activities that are prohibited for CASA volunteers. The specified prohibited activities must include:

- (1) Taking a child to the CASA volunteer's home;
- (2) Giving legal advice or therapeutic counseling;
- (3) Giving money or expensive gifts to the child or family;
- (4) Being related to any parties involved in a case or being employed in a position and/or agency that might result in a conflict of interest; and
- (5) Any other activities prohibited by the local juvenile court.

*(Subd (g) adopted effective January 1, 2005.)*

#### **(h) The appointment of CASA volunteers**

The CASA program director must develop, with the approval of the presiding juvenile court judge, a written procedure for the selection of cases and the appointment of CASA volunteers for children in juvenile court proceedings.

*(Subd (h) amended and relettered effective January 1, 2005; adopted as subd (f); previously amended effective January 1, 1995.)*

#### **(i) Oversight, support, and supervision of CASA volunteers**

A CASA program must adopt and adhere to a written plan, approved by the presiding juvenile court judge, for the oversight, support, and supervision of CASA volunteers in the performance of their duties. The plan must:

- (1) Include a grievance procedure that covers grievances by any person against a volunteer or CASA program staff and grievances by a volunteer against a CASA program or program staff. The grievance procedure must:
  - (A) Be incorporated into a document that contains a description of the roles and responsibilities of CASA volunteers. This document must be provided:
    - (i) When a copy of the court order that appointed the CASA volunteer is provided to any adult involved with the child's case, including but not limited to, teachers, foster parents, therapists, and health-care workers; and

(ii) To any person, including a volunteer, who has a grievance against a volunteer or a CASA program employee.

(B) Include a provision that documentation of any grievance filed by or against a volunteer must be retained in the volunteer's personnel file.

(2) Include a provision for the ongoing training and continuing education of CASA volunteers. Ongoing training opportunities must be provided at least monthly under section 103(a). CASA volunteers must participate in a minimum of 12 hours of continuing education in each year of service.

*(Subd (i) amended effective January 1, 2007; adopted as subd (g); previously amended effective January 1, 1995; previously amended and relettered effective January 1, 2005.)*

#### **(j) Removal, resignation, and termination of a CASA volunteer**

The CASA program must adopt a written plan for the removal, resignation, or involuntary termination of a CASA volunteer, including the following provisions:

- (1) A volunteer may resign or be removed from an individual case at any time by the order of the juvenile court presiding judge or designee.
- (2) A volunteer may be involuntarily terminated from the program by the program director.
- (3) The volunteer has the right to appeal termination by the program director under the program's grievance procedure.

*(Subd (j) amended effective January 1, 2007; adopted as subd (h); previously amended effective January 1, 1995; previously amended and relettered effective January 1, 2005.)*

#### **(k) CASA program administration and management**

A CASA program must adopt and adhere to a written plan for program governance and evaluation that includes the following as applicable:

- (1) Articles of incorporation, bylaws, and a board of directors. Any CASA program that functions under the auspices of a public agency or private entity must specify in its plan a clear administrative relationship with the parent organization and clearly delineated delegations of authority and accountability. No CASA program may function under the auspices of a probation department or department of social services. CASA programs may receive funds from probation departments, local child welfare agencies, and the California Department of Social Services if:
  - (A) The CASA program and the contributing agency develop a memorandum of understanding (MOU) or contract stating that the funds will be used only for general operating expenses as determined by the receiving CASA program, and the contributing agency will not oversee or monitor the funds;
  - (B) A procedure resolving any conflict between the CASA program and contributing agency is implemented so that conflict between the two agencies does not affect funding or the CASA program's ability to retain an independent evaluation separate from that of the contributing agency's; and
  - (C) Any MOU or contract between a CASA program and the contributing agency is submitted to and approved by Judicial Council staff.
- (2) A clear statement of the purpose or mission of the CASA program and express goals and objectives to further that purpose. Where the CASA program is not an independent nonprofit organization, but instead functions under the auspices of a public agency or a private entity, an active advisory council must be established. The advisory council for CASA programs functioning under the auspices of a public agency or a private entity will not function as the governing body of the CASA program. The board of directors for the private entity or the public agency management will function as the governing body for the CASA program, with guidance from the advisory council.
- (3) A procedure for the recruitment, selection, hiring, and evaluation of an executive director for the CASA program.
- (4) An administrative manual containing personnel policies, record-keeping practices, and data collection practices.
- (5) Local juvenile court rules developed in consultation with the presiding judge of the juvenile court or a designee, as specified in section 100. One local rule must specify when CASA reports are to be submitted to the court, who is entitled to receive a copy of the report, and who will copy and distribute the report. This rule must also specify that the CASA court report must be distributed to the persons entitled to receive it at least two court days before the hearing for which the report was prepared.

*(Subd (k) amended effective January 1, 2016; adopted as subd (i); previously amended and relettered as subd (k) effective January 1, 2005; previously amended effective January 1, 1995, January 1, 2000, and January 1, 2007.)*

#### **(l) Finance, facility, and risk management**

- (1) A CASA program must adopt a written plan for fiscal control. The fiscal plan must include an annual audit, conducted by a qualified professional, that is consistent with generally accepted accounting principles and the audit protocols in the program's contract with the Judicial Council.
- (2) The fiscal plan must include a written budget with projections that guide the management of financial resources and a strategy for obtaining necessary funding for program operations.
- (3) When the program has accounting oversight, it must adhere to written operational procedures in regard to accounting control.
- (4) The CASA program's board of directors must set policies for and exercise control over fundraising activities carried out by its employees and volunteers.
- (5) The CASA program must have the following insurance coverage for its staff and volunteers:
  - (A) General liability insurance with limits of liability of not less than \$1 million (\$1,000,000) for each person per occurrence/aggregate for bodily injury and not less than \$1 million (\$1,000,000) per occurrence/aggregate for property damage;

- (B) Nonowned automobile liability insurance and hired vehicle coverage with limits of liability of not less than \$1 million (\$1,000,000) combined single limit per occurrence and in the aggregate;
  - (C) Automobile liability insurance meeting the minimum state automobile liability insurance requirements, if the program owns a vehicle; and
  - (D) Workers' compensation insurance with a minimum limit of \$500,000.
- (6) The CASA program must require staff, volunteers, and members of the governing body, when applicable, to immediately notify the CASA program of any criminal charges against themselves.
- (7) The nonprofit CASA program must plan for the disposition of property and confidential records in the event of its dissolution.
- (Subd (l) amended effective January 1, 2016; adopted effective January 1, 2005.)*

**(m) Confidentiality**

The presiding juvenile court judge and the CASA program director must adopt a written plan governing confidentiality of case information, case records, and personnel records. The written plan must include the following provisions:

- (1) All information concerning children and families in the juvenile court process is confidential. Volunteers must not give case information to anyone other than the court, the parties and their attorneys, and CASA staff.
- (2) CASA volunteers are required by law (Pen. Code, § 11166 et seq.) to report any reasonable suspicion that a child is a victim of child abuse or serious neglect as described by Penal Code section 273.
- (3) The child's original case file must be maintained in the CASA office by a custodian of records and must remain there. Copies of documents needed by a volunteer must be restricted to those actually needed to conduct necessary business outside of the office. No one may have access to the child's original case file except on the approval of the CASA program director or presiding judge of the juvenile court. Controls must be in place to ensure that records can be located at any time. The office must establish a written procedure for the maintenance of case files.
- (4) The volunteer's personnel file is confidential. No one may have access to the personnel file except the volunteer, the CASA program director or a designee, or the presiding judge of the juvenile court.

*(Subd (m) amended effective January 1, 2007; adopted as subd (j); previously amended effective January 1, 1995; previously amended and relettered effective January 1, 2005.)*

*Rule 5.655 amended effective January 1, 2016; adopted as rule 1424 effective July 1, 1994; previously amended and renumbered as rule 5.655 effective January 1, 2007; previously amended effective January 1, 1995, January 1, 2000, January 1, 2001, January 1, 2005, and January 1, 2010.*

**Advisory Committee Comment**

These 1995 guidelines implement the requirements of section 100, which establishes a grant program administered by the Judicial Council to establish or expand CASA programs to assist children involved in juvenile dependency proceedings, including guardianships, adoptions, and actions to terminate parental rights to custody and control.

CASA programs provide substantial benefits to children appearing in dependency proceedings and to the juvenile court having responsibility for these children. Child advocates improve the quality of judicial decision making by providing information to the court concerning the child. Advocates help identify needed services for the children they are assisting and provide a consistent friend and support person for children throughout the long and complex dependency process.

The CASA concept was first implemented in Seattle in 1977. As of 1994, there were more than 30,000 volunteers working in more than 525 CASA programs in nearly every state. The programs recruit, screen, select, train, and supervise lay volunteers to become effective advocates in the juvenile court.

Currently, numerous jurisdictions in California use some variation of the CASA concept. These programs have developed over the past several years under the supervision of local juvenile courts under sections 356.5 and 358. Each program is unique and was designed to respond to the specific needs of the local jurisdiction and community it serves.

These guidelines provide a framework for ensuring the excellence of California CASA programs and volunteers. They are intended to be consistent with the guidelines established by the National CASA Association and to conform with the requirements of California law and procedure. The California CASA Association has assisted in developing these guidelines, which are meant to give the local bench, bar, child welfare professionals, children's advocates, and other interested citizens full rein to adapt the CASA concept to the special needs and circumstances of local communities.

Central to the intent of these guidelines is the effort to provide a vehicle for the presiding judge of the local juvenile court to exercise fully informed and effective oversight of the local CASA program and CASA volunteers. These guidelines are also intended to help CASA programs and juvenile courts develop local court rules. Nothing in these guidelines should limit or restrict the local juvenile court from developing and supporting multiple branches of a CASA program within the community to enable a county to offer comprehensive volunteer advocacy programs for children.

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**ATTACHMENT B**



ATTACHMENT B

**Voices for Children, Inc.**

**WRITTEN PLAN AND PROCEDURES PER RULE 5.655**

**Rule 5.655. Program requirements for Court Appointed Special Advocate program.**

**Rule 5.655(h) The appointment of CASA volunteers**

**SELECTION GUIDELINES**

**VOLUNTEER RECRUITMENT AND SELECTION CRITERIA**

**RECRUITMENT OF CASA VOLUNTEERS**

Voices for Children’s Volunteer Recruitment team is responsible for recruiting the volunteers necessary to provide every child in need with a CASA. Diversity is a strong institutional value at Voices for Children; it is reflected in the staff and, increasingly, in the Board of Directors and the CASA volunteers who serve a very diverse population of children in San Diego and Riverside Counties. We are intentional in our use of diverse images and messages (including bilingual English/Spanish collateral and advertising) as we reach out with our marketing materials, branding messages, social networking, and advertising. However, we know that we need more CASAs who are male, Spanish-speaking/Latino, African-American, and LGBTQ, and have taken steps in those directions. Our Volunteer Recruitment team is strategic about the areas where we give presentations, so VFC can reach appropriate community and business groups and provide the highest quality CASA volunteers to children.

Volunteers are the heart of the CASA Program. Recruiting and selecting volunteers to work with children can be difficult, but it is the child’s interest that is always the criteria. The following guidelines are used to help in recruitment and selection of volunteers. Because no one person can be all these things, it is important that each Advocacy Supervisor on staff provides support and encouragement to volunteers to enable them to do the important work they do with children under the Court’s jurisdiction.

1. Successful completion of required clearances as defined by Rule of Court 5.655(c):
  - Be at least 21 years of age to begin service
  - Commit to a minimum 18 months of volunteer service
  - Clear a criminal background check
  - Have at least 2 years driving experience and a valid driver’s license
  - Provide a DMV history report (with fewer than three points) and verification of auto insurance
  - Three positive personal references

2. Successful Completion of an interview process to determine ability to:

- Be an emotionally mature and stable person
- Be objective and receptive to backgrounds, experiences, and individual lifestyles that are different from his or her own
- Possess a sense of self-worth, exhibit self-assurance, be able to deal with hostility and rejection, be persistent, and be flexible enough to accommodate change
- Have a sense of personal integrity, be consistent with his or her words and actions, and be committed to following through
- Be willing to drive to a variety of locations throughout San Diego County

3. Additional selection criteria

- Investigate and do research – interview, observe listen and analyze written material
- Write clearly and concisely
- Express themselves verbally
- Plan and set goals
- Organize tasks and information
- Pay attention to detail and accuracy
- Make decisions
- Be assertive
- Be a credible witness
- Be collaborative, credible and objective
- Follow guidelines and policies
- Be tactful

**INITIAL TRAINING OF CASA VOLUNTEERS (Rule 5.655(d)(2); WIC 102(d))**

The initial training curriculum will include at least 35 hours of formal instruction. This curriculum will include mandatory training topics as listed in WIC section 102(d). The curriculum will also include additional appropriate topics. The final selection process is contingent on the successful completion of the initial training program.

At the completion of training, and before assignment to any child's case, the CASA volunteer will take a court-administered oath describing the duties and responsibilities of the advocated under WIC, Section 103(f). CASA volunteer must also sign a written affirmation of the oath. The signed affirmation will be retained in the volunteer's file.

**APPOINTMENT OF VOLUNTEERS/ASSIGNING A CASE**

Once a volunteer has been accepted into the CASA program, the next step is to assign a case to him/her. Voices for Children staff will review the matching list and select a child/ren's case for the CASA volunteer to review. Children who are deemed "high risk" or who have been on the matching list for a considerable amount of time will take priority.

Voices for Children will strive to assign newly trained and cleared volunteer advocates to a minor within two weeks of graduating from training. Once appointed, CASA volunteer

must commit a minimum of 18 months of service to the child/ren or until relieved by the court at case closure.

While Voices for Children, Inc. does not discriminate in the recruitment of volunteers and actively seeks volunteers of diverse ages, races, cultures, etc., the appointment of a volunteer on a particular case will be subject to the following criteria:

- Case assignment will be handled based on the child’s needs and availability of volunteers
- The complexity of the case
- The age and gender of the child or children
- The cultural, ethnic, linguistic and other background characteristics (including any disabilities) of the child or family
- The absence of any conflict of interest on the part of the volunteer and any other party in the case
- A case will be made high priority for assignment when the following are present:  
(Priority will not be based on age, gender, or sexual orientation)
  - Child has no family or lifetime connection available
  - Child’s behavior is escalating and child is out of control
  - Services to address these issues have not been ordered or delayed
  - Child has had multiple placements
  - Special Request from Judge, attorney or social worker due to severity of case

CASA Court Reports – For any case in which the court has ordered the appointment of a court-appointed special advocate (CASA), the advocate volunteer must prepare a typewritten report for the Juvenile Court hearing. These reports will be reviewed, edited, and distributed through the Voices for Children office, to the court, the parties and their attorneys, at least two (2) court days before the hearing for which the report was prepared.

In the event that a CASA volunteer resigns or discontinues their services as a volunteer while assigned to a minor, a Voices for Children designee will notify the court and make every effort to assign another volunteer to the minor.

Appointment of CASA volunteer may continue after the child attains his or her age of majority, with the consent of the nonminor dependent.

### **Reassigning a CASA Volunteer**

If a CASA volunteer has completed one case and is interested in taking a second case, the Advocacy Supervisor will review the cases on the wait list to determine what might be a good match for the CASA volunteer and will then follow the procedure for assigning as in the first case.

If the CASA volunteer indicates a desire to take a break, the Advocacy Supervisor will do the following:

- Enter the CASA volunteer’s status as “On Leave” in CASA Manager. Enter the date which the CASA volunteer indicated he/she may be ready to be reassigned.
- Develop a tickler system to remind the Advocacy Supervisor when to contact the CASA volunteer pursuant to the procedure “Available/On Leave Status”.

**Rule 5.655(i) Oversight, support, and supervision of CASA volunteers**

**SUPERVISION AND SUPPORT OF VOLUNTEERS**

Voices for Children's goal is to provide a trained, monitored and supported volunteer CASA to every child in the dependency system. Voices for Children will provide the oversight, support, and supervision of CASA volunteers in the performance of their duties throughout his or her involvement in the program. CASA volunteers will be provided with monthly ongoing training and continuing education.

**Rule 5.655 (i)(1) Grievance Policy**

**GRIEVANCE POLICY**

A grievance is defined as a formal statement of complaint and can be made by any party associated with a case. Voices for Children's primary goal is to solve concerns or disputes in a collaborative and informal manner when feasible.

Any potential CASA Volunteer or a community member who believes he/she suffered harm by the interpretation, application or performance of the Voices for Children program or any of its board of directors, volunteers or program staff may seek relief of the situation via this grievance policy and procedure.

**Grievance Procedure**

Any person with a complaint against a volunteer or staff member shall be directed to follow the prescribed grievance procedure. The complaint should be made in writing to the individual's immediate supervisor and shall contain the following:

1. The name of the individual involved;
2. A specific description of the alleged inappropriate or improper conduct;
3. The date or dates the conduct occurred;
4. The name and petition number of the case involved;
5. The actions taken to address the complaint directly with the individual involved by the complainant; and
6. The complainant's desired outcome.

Within 10 business days of the receipt of a complaint, the immediate supervisor of the individual shall send a written response to the complainant that should include the nature of the supervisor's investigation and any action taken.

If the complainant is not satisfied with the written response or action of the individual's immediate supervisor, then the complainant may forward the complaint to the VFC Senior Vice President of Programs. This document should include the foregoing written complaint, as well as additional information as to the reasons the complainant is dissatisfied with the initial response. The Senior Vice President of Programs will then respond in writing within 10 business days of receipt of the complaint. If requested, the Vice President of Programs will meet the complainant to discuss the matter.

In the event that the matter is not resolved with the VFC San Diego's Senior Vice President of Programs, a complainant may request that the President/CEO become involved. The President/CEO must receive written notice of the complainant's dissatisfaction with the handling of the matter by the Senior Vice President of Programs within 10 business days.

Any grievance that is filed against a CASA shall be retained in the CASA's file, as required by rule 5.655(i)(1)(b).



A copy of this grievance procedure must be provided when a copy of the Order of Appointment of a CASA volunteer is provided to any parties involved in the child's case and to any person who has a grievance against a CASA volunteer or a Voices for Children program employee.

### **Grievance by a Volunteer or Staff -Whistleblowers**

Voices for Children's (VFC) policies require Board members, volunteers, and employees to observe high standards of business, and personal or educational ethics in the conduct of their duties and responsibilities. Employees and volunteers of VFC practice honesty and integrity in fulfilling their responsibilities and comply with all applicable laws, regulations and/or policies. The objectives of the Whistleblower Policy are to establish policies and procedures for:

- The submission of concerns regarding questionable accounting or audit matters by employees, Board members, officers, volunteers and other stakeholders of VFC on a confidential and anonymous basis.
- The submission of substantial concerns that affect the integrity of VFC.
- The receipt, retention, and treatment of complaints received by VFC regarding accounting, internal controls, auditing matters or other substantial concerns that affect the integrity of the organization.
- The protection of Board members, volunteers and employees reporting concerns from retaliatory actions.

Under no circumstances, should the Board of Directors become involved in personnel matters involving the staff or volunteers or in program issues not related to the above.

### **Reporting Responsibility**

Each Board member, volunteer, and employee of VFC has an obligation to report in accordance with this Whistleblower Policy (a) questionable or improper accounting or auditing matters, and (b) violations and suspected violations of VFC's policies which affect the integrity of the organization (hereafter referred to as "concerns").

### **Authority of the Board of Directors**

All concerns that, after investigation, are believed to have merit will be forwarded to the Chair of the Board of Directors in accordance with the procedures set forth herein. The Officers of the Board shall be responsible for directing additional investigation, and for making appropriate recommendations to the Board of Directors, with respect to the concerns reported to them.

### **No Retaliation**

This Whistleblower Policy is intended to encourage and enable Board members, volunteers, and employees to raise concerns within VFC for investigation and appropriate action. With this goal in mind, no director, volunteer, or employee who, in good faith, reports a concern shall be subject to retaliation or, in the case of an employee, adverse employment consequences. Moreover, a volunteer or employee who retaliates against someone who has reported a concern in good faith is subject to discipline up to and including dismissal from the volunteer position or termination of employment.

### **Reporting Concerns**

Employees should first discuss their concern with their immediate supervisor. If, after speaking with his or her supervisor, the individual continues to have reasonable grounds to believe the concern is valid, the individual should then report the incident to the President/CEO. If the President/CEO agrees that there is validity, the President/CEO will direct an investigation, which, if evidence is found during the

investigation, will report the concern to the Chair of the Board of Directors (“Chair”) for further directions. If the individual continues to have reasonable grounds to believe the concern is valid, the individual should then report the concern to the Chair. In addition, if the individual is uncomfortable speaking with his or her supervisor or the President/CEO, or if the President/CEO is a subject of the concern, the individual should report his or her concern directly to the Chair.

If the concern was reported verbally to the President/CEO, the reporting individual, with assistance from the President/CEO, shall reduce the concern to writing. The President/CEO is required to promptly report the concern to the Chair of the Board of Directors. The Chair, who may in turn notify the Board of Directors’ Officers (“Officers”), will direct any further investigation into the matter. Concerns may also be submitted anonymously. Such anonymous concerns should be in writing and forwarded to those designated above.

### **Board Members and Other Volunteers**

Board members should submit concerns in writing directly to the President/CEO. If, after speaking to the President/CEO, the individual continues to have reasonable grounds to believe the concern is valid, or if the President/CEO is a subject of the concern, the individual should then report the concern to the Chair.

### **Handling of Reported Violations**

The Chair shall address all concerns which have been reported to him/her from the process above. The Chair shall immediately notify the Officers and the President/CEO of any such report. The Chair will notify the sender and acknowledge receipt of the concern within five business days, if possible. It will not be possible to acknowledge receipt of anonymously submitted concerns.

All concerns which are reported to the Chair will be promptly further investigated, and appropriate corrective action will be recommended to the Board of Directors, if warranted by the investigation. In addition, action taken must include a conclusion and/or follow-up with the complainant for complete closure of the concern.

The President/CEO and the Chair have the authority to retain outside legal counsel, accountants, private investigators, or any other resource deemed necessary to conduct a full and complete investigation of the allegations.

### **Acting in Good Faith**

Anyone reporting a concern must act in good faith and have reasonable grounds for believing the information disclosed indicates an improper accounting or auditing practice, a violation of the codes or a violation of policy which affects the integrity of VFC. The act of making allegations that prove to be unsubstantiated, and that prove to have been made maliciously, recklessly, or with the foreknowledge that the allegations are false, will be viewed as a serious disciplinary offense and may result in discipline, up to and including dismissal from the volunteer position or termination of employment. Such conduct may also give rise to other actions, including civil lawsuits.

### **Whistleblower Confidentiality**

Reports of Concerns, and investigations pertaining thereto, shall be kept confidential to the extent possible, consistent with the need to conduct an adequate investigation. Disclosure of reports of concerns to individuals not involved in the investigation will be viewed as a serious disciplinary offense and may result in discipline, up to and including termination of employment. Such conduct may also give rise to other actions, including civil lawsuits.

**Rule 5.655(i)(A) Roles and Responsibilities of CASA volunteers**

**CASA DUTIES AND RESPONSIBILITIES Rule 5.655(f)**

**CASA volunteers serve at the discretion of the court having jurisdiction over the proceeding in which the volunteer has been appointed. A CASA volunteer is an Officer of the Court and is bound by all court rules under section 103(e) of Welfare and Institution Code.**

**Voices for Children, Inc. has developed and adopted a description of duties and responsibilities, consistent with local court rules that address all of the following:**

- Develop and maintain a relationship by visiting the child/ren frequently, and taking them out into the community to better understand the child/ren's needs and desires.
- Speak with the child alone regarding his/her problems and needs
- Support the child throughout the court proceeding
- Explain the court proceedings to the child/ren
- Explain the CASA volunteer's role, duties and responsibilities to all parties associated with the case
- Interview all parties involved in the case, social workers, teachers, foster parents, group home staff, therapists, psychiatrists/psychologists, child/ren's parents if appropriate, and other individuals directly involved in the care of the child/ren
- Monitor the child/ren's placement by talking with the child/ren individually regarding his/her problems or needs, and by talking with the child/ren's caretakers about the child/ren's behavior and relationships
- Monitor the case to ensure the child's essential needs are met, the court's orders are carried out, and bring significant changes in situation or violations of court orders to the attention of the appropriate persons or authorities
- Review available records regarding the child/ren's family history, education, medical and mental health history, etc.
- Report any incidents of child abuse or neglect to the Voices for Children Advocacy Supervisor and appropriate authorities
- Determine whether appropriate services, including reasonable efforts are made to reunify the family or a permanent plan has been created for the child/ren
- Participate in discussions involving the child/ren's permanent plan and treatment by communicating and coordinating efforts with the child/ren's social worker, therapist, attorney and probation officer, if applicable
- Investigate the interests of the child/ren in judicial or administrative proceedings outside of Juvenile Court
- Maintain complete written records about the case, including appointments, interviews and information gathered about the child
- Prepare a type written report for the child/ren's hearing to Voices for Children Advocacy Supervisor within 15 business days prior to the court hearing date
- Attend Court hearings
- Other duties and responsibilities as determined by the Judge of the Juvenile Court or Voices for Children's program management

**Rule 5.655(g) PROHIBITED ACTIVITIES**

A CASA volunteer should not provide direct service delivery to any parties that could (a) lead to a conflict of interest or liability problems, of (b) cause a child or family to become dependent on the CASA volunteer for services that should be provided by other agencies or organizations. Examples of inappropriate volunteer practices are:

- 1) Taking a child home or sheltering a child in the home
- 2) Giving legal advice or therapeutic counseling
- 3) Making placement arrangements for the child
- 4) Giving money or expensive gifts to the child or family
- 5) Being related to any parties involved in a case or being employed in a position and/or agency that might result in a conflict of interest; and
- 6) Any other activities prohibited by the local juvenile court or Voices for Children's policies and procedures.

A CASA volunteer should only transport a child when there is liability insurance coverage for such activity.

Ongoing training and continuing education opportunities of CASA volunteers are offered monthly and CASA volunteers must participate in a minimum of 12 hours of continuing education in each year of service.

**Rule 5.655(e) Oath**

**VOICES FOR CHILDREN, INC.  
OATH OF CONFIDENTIALITY**

I do solemnly swear that I will well and faithfully discharge the duties upon which I am about to enter; that I will protect the confidentiality of all materials, information, records, written or oral, pertaining to Voices for Children, Inc. at Juvenile Court of which I may be privy; and that under no circumstances will I ever reveal, discuss or permit such information to be disseminated in any matter whatsoever to any person or organization not expressly authorized by the Court.

\_\_\_\_\_  
Signature

Subscribed and sworn before me on

\_\_\_\_\_  
Date

Clerk of Superior Court

By \_\_\_\_\_  
Deputy Clerk

**Rule 5.655(m) Confidentiality****Confidentiality**

Few areas are as sensitive to Juvenile Court as the child's rights to confidentiality and who has privileged information. All information concerning children and families, including nonminors, in the juvenile court process is confidential. Possession of confidential information is forbidden to the general public, but is allowed to valid classes of individuals who are authorized by law to have access to the information. This includes professionals who are active in the juvenile court system and are working on the specific case in question.

CASA volunteers must keep all information regarding the case confidential and make no disclosure, except by court order or unless provided by law. Mistakes in handling confidential information can be detrimental to the children involved and can bring criminal action against the people who misuse the information. When in doubt, discuss any confidentiality concerns with your supervisor. The child/ren's rights to privacy and confidentiality must be protected at all times. To maintain confidentiality, CASA volunteers must follow the following procedures:

- CASA volunteers shall not give case information to anyone other than the court parties, the child's attorney, and Voice for Children staff.
- CASA volunteers may not disseminate information about a case, whether active or closed, to members of the general public who have no legal interest in the proceeding. Information may not be repeated or confirmed to the press even if it has been previously stated in the media.
- CASA volunteers may not use the child/ren's last name or reveal any other information that would identify the CASA child or family to a person not directly involved with the case (including the advocate's own spouse and family).
- The child/ren's attorney and other legally entitled parties are given copies of the CASA volunteer's reports. These reports must be distributed through the Voices for Children office. All information contained in the court report must be approved by the Advocacy Supervisor, Program Manager and/or Program Director and/or President/CEO.
- CASA volunteers must sign an oath of confidentiality which is retained in the Volunteer's file
- All education, social services, attorney, Voices for Children Advocacy Supervisor and/or support group meetings are confidential. Information obtained from these meetings can only be disclosed to authorized parties.
- Photographs of the child are the property of the child and can only be displayed by the child.
- CASA volunteers are mandated reporters and must report any reasonable suspicion that a child is a victim of child abuse or serious neglect as described by Penal Code section 273.
- In cases where it is appropriate in administering justice, in consultation with the advocacy supervisor, a CASA volunteer may disclose general information about a case, without mentioning names. CASA volunteers must disclose information if so ordered by a Judge or Commissioner of the Court.

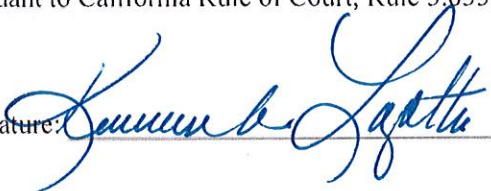
Child/ren's original case files must be maintained and remain in the Voices for Children's office. CASA volunteers may obtain copies of documents only if needed to conduct case related business outside of Voices for Children offices. CASA volunteers will destroy, by shredding, any and all such copies (in every form and medium) as soon as their need for such copies terminates. Once a CASA volunteer's representation of a child terminates, the volunteer will ensure that all case information is returned to Voices for Children's office or destroyed. No one may have access to the child's case file except on the approval of the Voices for Children's President/CEO and/or presiding judge of the juvenile court. Volunteer files are confidential and no one may have access to them except the volunteer, the Voices for Children Senior Vice President of Programs and/or President/CEO or a designee, or the presiding judge of the juvenile court. The Voices for Children office must maintain a written procedure for the maintenance of case files and controls to ensure that records can be located at any time.



Submitted by Voices for Children, Inc.

Signature:  Date: 11/8/18  
John Valencia  
President/CEO

I, Kimberlee A. Lagotta, as Presiding Juvenile Court Judge of the Superior Court of California, County of San Diego, approve the Written Plans and Procedures stated above pursuant to California Rule of Court, Rule 5.655.

Signature:  Date: 11/8/18

Revised 3/2018

**ATTACHMENT C**



F I L E D

Clk of the Superior Court

JUN 25 2018

~~DAVE~~ ~~DEBBY~~  
P.M. LAITS

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THE SUPERIOR COURT OF THE STATE OF CALIFORNIA  
IN AND FOR THE COUNTY OF SAN DIEGO  
JUVENILE DIVISION

IN THE MATTER OF: )  
ORDER AUTHORIZING VOICES )  
AUTHORIZATION FOR VOICES FOR ) FOR CHILDREN TO ACCESS )  
CHILDREN TO ACCESS JUVENILE COURT ) DEPENDENTS' AND WARDS' )  
FILES ) FILES, INCLUDING ELECTRONIC )  
RECORDS )

Voices for Children ("VFC") administers the Court Appointed Special Advocate (CASA) Program in San Diego County. Pursuant to section 102(c)<sup>1</sup>, the program provides volunteers to serve as CASAs and the CASA volunteers serve at the discretion of the Court. CASAs may be appointed for dependents, nonminor dependents, or wards of the juvenile court. (§ 103(b).)<sup>2</sup> CASA volunteers are required to complete initial and ongoing training and are considered officers of the court. (§ 102(d), § 103(e).) Although the juvenile court files of dependents, nonminor dependents, and wards of the juvenile court are generally confidential, CASA volunteers are considered court personnel for the purpose viewing a court file. (§ 103(i); § 827(a).)

<sup>1</sup> All statutory references are to the California Welfare and Institutions Code unless otherwise indicated.

<sup>2</sup> VFC began providing CASAs to youth involved with Juvenile Justice (i.e. delinquency proceedings) in San Diego County on April 1, 2018.

1 To maximize the service to the Court, VFC administers a Case Assessment Program.  
2 This program is designed to determine the needs of dependents and wards *prior* to the  
3 appointment of a CASA. This is accomplished in two ways. VFC staff review court files prior  
4 to the children becoming wards or dependents to identify children in need of a CASA.<sup>3</sup> In  
5 addition, VFC staff continue to review the files of dependents and wards not initially appointed a  
6 CASA in an ongoing effort to determine whether the needs of the youth have changed and the  
7 youth would benefit from the appointment of a CASA in later stages of the proceedings. The  
8 goal of the program is to ensure all children in need of a CASA have one available at the earliest  
9 possible time in the proceedings.

10 Currently, there is no specific order in place memorializing VFC's permission to access  
11 the case files of dependents and wards prior to appointment of a CASA. VFC is respectfully  
12 requesting a specific order allowing VFC staff to review the case files of dependents and wards  
13 of the San Diego Superior Court prior to appointment of a CASA for the purposes of  
14 administering the Case Assessment Program. This order will not result in a change or increase in  
15 access to court files by VFC staff, but it will serve to formalize the process currently in place. In  
16 light of the Court's anticipated transition to electronic files, VFC specifically requests the order  
17 to include access to the Court's electronic records. The request serves the stated purpose of the  
18 VFC program which is to "provide a trained CASA volunteer to every abused, abandoned, or  
19 neglected child who needs one, and advocate to improve the lives of children in the foster care  
20 system".<sup>4</sup>

21 FOR GOOD CAUSE SHOWN, THE COURT HEREBY ORDERS:

22 VFC shall have access to the court's files for dependents and wards of the San Diego  
23 Superior Court, including but not limited to the electronic records contained in the Justice  
24 Electronic Library System ("JELS"), for the purposes of evaluating and recommending CASA  
25 appointments through the Case Assessment Program. Consistent with section 107(b), this order  
26


27 \_\_\_\_\_  
28 <sup>3</sup> Case file reviews for dependents and wards prior to a CASA being appointed are done by VFC  
staff which is distinguishable from CASA volunteers. (§ 102 (a).)

<sup>4</sup> <https://www.speakupnow.org/about-us/mission/>

1 does not include access to the case files of nonminor dependents without the explicit written  
2 consent of the nonminor dependent.

3  
4 IT IS SO ORDERED.

5  
6 DATED: 6/25/18

7   
8 KIMBERLEE LAGOTTA  
9 JUDGE OF THE JUVENILE COURT  
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ORDER - 3

**ATTACHMENT D**

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**IN THE SUPERIOR COURT OF THE STATE OF CALIFORNIA  
IN AND FOR THE COUNTY OF SAN DIEGO**

IN THE MATTER OF:

VOICES FOR CHILDREN,

Petitioner.

} **ORDER AUTHORIZING ELECTRONIC  
ACCESS TO JUVENILE DEPENDENCY  
CASE MANAGEMENT SYSTEM ("JDEP")**

Pursuant to Welfare and Institutions Code ("WIC") section 827, California Rules of Court, rule 5.552, and San Diego Superior Court local rule 6.6.4, Voices for Children ("Petitioner") has requested a court order granting it electronic access to the Juvenile Dependency Case Management System ("JDEP") for juvenile dependency actions at the Superior Court of California, County of San Diego, Juvenile Division ("Court"), as specified below. This Order is sought for the purpose of supporting Petitioner in its role of providing, training, and supervising volunteers to serve as Court-Appointed Special Advocates ("CASAs") for children who are under the dependency jurisdiction of the Court. Petitioner has voluntarily agreed that, if the Court exercises its discretion to grant its request, Petitioner will abide by the terms and conditions of this Order. It is the intent of the Court to grant the request to the extent necessary to allow Petitioner to fulfill its role.

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FOR GOOD CAUSE SHOWN, IT IS HEREBY ORDERED:

1. Petitioner shall have electronic access to JDEP pursuant to this Order, Court Rule 6.6.4 and the terms of the Amendment to Agreement re Access to Court Records, executed on May \_\_, 2014 (the "Amendment"), which is incorporated herein by reference and a copy of which is attached as Exhibit A.

2. Copies of this Order shall be distributed to Petitioner; Court IT; the County of San Diego, Health and Human Services Agency, Child Welfare Services; and the Dependency Legal Group of San Diego.

3. Petitioner shall not share information from JDEP with any other person or entity unless Petitioner first obtains permission from the Court.

4. Petitioner shall maintain the confidentiality of the JDEP information pursuant to all applicable laws, regulations and rules (see Cal. Const., Art. I, § 1; WIC §§ 105, 346, 362.5, 676, 827, 10850, 16001.9; Cal. Rules of Court, rule 5.552; San Diego Superior Court local rule 6.6.4), and shall use the information only to the extent necessary to support Petitioner's role of providing, training, and supervising volunteers to serve as CASAs in the Court.

5. Any unauthorized disclosure of confidential information or failure to comply with the terms of this Order or the Agreement Re Access to Court Records, between Petitioner and Court, entered into on December 21, 2012 (Exhibit B) and the Amendment thereto (Exhibit A) may result in the vacation of this Order and/or may be punishable as contempt of court.

6. This Order is not intended to replace, nullify, or conflict with any existing policies of the Health and Human Services Agency; Child Welfare Services; the San Diego County Juvenile Probation Department; or any other public or private agency.


7. Under no circumstances shall this Order or any part of it be interpreted to permit access to or the release of records protected under any other federal or state law, including but not limited to Penal Code section 11164 et seq., except as provided in those statutes, or to limit access to or release of records permitted under any other federal or state statute, including but not limited to Government Code section 13954.

///

1           8.       This Order shall remain in effect until superseded or rescinded by subsequent  
2 order or rule of court.

3           IT IS SO ORDERED.

4  
5 DATED: 5/15/14

  
6           CAROLYN M. CAIETTI  
7           JUDGE OF THE SUPERIOR COURT

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**EXHIBIT A**

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AMENDMENT TO AGREEMENT RE ACCESS TO COURT RECORDS  
BETWEEN  
SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO  
AND  
VOICES FOR CHILDREN

This Amendment to the Agreement Re Access to Court Records, between Superior Court of California, County of San Diego ("Court") and Voices for Children ("VFC"), which was entered into on December 21, 2012 (the "Agreement"), is made and entered May 1, 2014 ("Effective Date").

Whereas the Court has replaced the REJIS system with the Juvenile Dependency Case Management System ("JDEP"), the parties agree to amend the Agreement as follows:

1. All references in the Agreement to "REJIS" are replaced with "JDEP."
2. The language in Paragraph 3 is deleted in its entirety and replaced with the following language:

The purpose of this Agreement is to establish the roles and responsibilities between the parties concerning JDEP. Court is granting VFC limited access to JDEP for the purpose of supporting its role of providing child advocates for dependent children of the Court, pursuant to San Diego Superior Court local rule 6.6.4. VFC shall have the following access rights:

a. View Family and Minor information which includes:

- (1) Name
- (2) Address
- (3) Attorney/Associations
- (4) Hearings
- (5) Minute Orders
- (6) Petition
- (7) Warrants
- (8) Non-hearing actions

b. View/Print hearing and non-hearing minute orders.

3. The language in Paragraph 4 is deleted in its entirety and replaced with the following:

This Agreement provides for the protection of the confidentiality of the records being accessed.

a. VFC agrees and acknowledges that the records are subject to the confidentiality provisions and privileges of the law and the constitutional right to privacy, and agrees to comply with all laws, regulations and rules concerning the confidentiality of the records. (See Cal. Const., Art. I, § 1; Welf. & Inst. Code, §§ 346, 362.5, 676, 827, 10850 & 16001.9; San Diego Superior Court local rule 6.6.4);

b. VFC agrees that it will provide procedures to each of its authorized VFC personnel, cause each of them to sign a Confidentiality Agreement for JDEP ACCESS AND USE in the form attached hereto as Exhibit A (or such other updated form as the Court may require), and provide copies of each such signed agreement to the Court prior to the user having any access to JDEP;

c. VFC shall provide a secure area, outside the public view, for terminal access to JDEP;

d. VFC shall provide adequate desktop screen saver locking after 15 minutes of inactivity;

e. VFC shall maintain a physically secure storage place for all written reports of information printed from JDEP, to prevent access by persons who are not authorized to access that information;

f. VFC agrees not to release or disclose confidential information to any persons or agencies not legally authorized to receive such information;

g. VFC agrees that all individually identifiable information furnished by JDEP shall be destroyed by shredding or a similar method of destruction once the use of the information has ended;

h. VFC agrees that it will ensure that its users designated to have access to the JDEP system will not use or share their confidential logon ID/Password with any individuals;

i. VFC agrees that its users access through JDEP shall only be made for purposes relating to Court business;

j. VFC agrees that it will ensure that its users will not access JDEP records relating to themselves, friends, relatives, acquaintances, or other persons they may know;

k. In the event that any unauthorized access to or use of confidential information by any VFC user occurs, VFC shall take appropriate disciplinary action against such user. VFC shall notify Court when a user is subject to disciplinary action;

l. VFC understands that any breach of confidentiality could result in the termination of this Agreement.

4. The language in Paragraph 5 is deleted in its entirety.

5. Additional Agreement terms, the language in paragraph A is deleted in its entirety and replaced with the following:

Court Role and Responsibilities:

1. Court will retain ownership of and shall maintain the JDEP system. The Court does not warrant the accuracy of the data provided;
2. Court will provide VFC with a point of contact for troubleshooting technical issues during regular business hours. In this case, it is the Court's Helpdesk;
3. Court will set up and maintain user accounts and passwords for each of the authorized VFC employees, in accordance with Court security policies;
4. Court will run access audit reports on authorized VFC users, when there is a concern related to confidentiality. The Court may at any time and for any reason monitor and/or review the use of JDEP by VFC users;
5. Court will make any agreed upon system updates available to VFC;
6. Court will provide IP addressing information to VFC technical staff to terminate the Site-to-Site VPN at the Court, or to connect via remote VPN devices;
7. Court will provide keys to VFC technical staff in support of Site-to-Site VPN;
8. Except as otherwise set forth in this Agreement, the Court will be responsible for its own costs and expenses incurred as a result of this project, and shall not be responsible for costs and expenses voluntarily incurred by VFC, unless the Court gives prior written approval specifically authorizing the cost or expense and expressly agreeing to reimburse VFC for such cost or expense.

6. Additional Agreement terms, the language in paragraph B is deleted in its entirety and replaced with the following:

VFC Role and Responsibilities

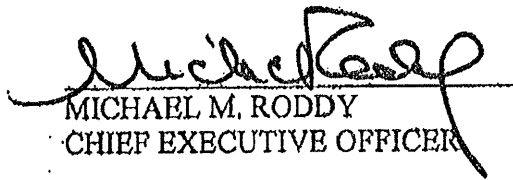
1. VFC will provide Court a current point of contact for troubleshooting technical issues;
2. JDEP shall only be accessible to authorized VFC personnel from computers located at VFC's offices. VFC shall not authorize or allow any of its authorized VFC personnel to have remote access to JDEP;
3. VFC will provide, at its sole cost, all connectivity components to the Court's network, which include:
  - a. Point to Point VPN solution having the ability to establish a Site-to-Site VPN tunnel from VFC to the Court's existing VPN hardware (a Cisco ASA5540);
  - b. An Always-On Internet access for the device(s) that will be accessing JDEP;
  - c. Any required telecommunications equipment, software or firmware to ensure VFC can maintain and connect to authorized Court resources; and

- d. Technical expertise to set up and maintain all of the above;
- 4. VFC shall provide and maintain at its sole cost all equipment and supplies necessary for its users to access and print from JDEP at VFC's premises, including but not limited to its office computers and printers;
- 5. VFC shall maintain current desktop virus protection levels via a commercial strength anti-virus software package, such as McAfee, Norton, etc.;
- 6. VFC agrees to abide by all applicable security procedures required by the Court that relate to the JDEP system, which include the procedures set forth in this Agreement;
- 7. VFC shall submit a Court Services Request Form ("CSRF") (Attachment B), as supplied by the Court, for each individual who requires access to JDEP ("authorized VFC personnel");
- 8. VFC shall maintain one unique user id for each authorized VFC personnel who has access to JDEP;
- 9. VFC shall maintain and provide to the Court upon request a list of authorized VFC personnel, along with the work locations from which access will occur;
- 10. VFC shall immediately notify Court Helpdesk when any authorized VFC personnel no longer needs access to JDEP, including but not limited to when that person's employment with VFC ends. VFC shall also notify Court Helpdesk within ten (10) court days when a user's work location changes;
- 11. VFC shall be responsible for training its personnel in the use of JDEP, including training on security and confidentiality requirements;
- 12. VFC shall ensure that its personnel and all persons acting on its behalf comply with the terms of this Agreement, which steps shall include but not be limited to providing adequate training and direction; appropriately monitoring use of JDEP; and promptly ceasing and remedying any breach of the terms by any person;
- 13. VFC agrees to allow the Court or its authorized representatives to make on-site inspections to ensure that the terms of this Agreement are being met;
- 14. Except as otherwise set forth in this Agreement, VFC shall be responsible for its own costs and expenses incurred as a result of this project, and shall not be responsible for costs and expenses voluntarily incurred by the Court, unless VFC gives prior written approval specifically authorizing the cost or expense and expressly agreeing to reimburse the Court for such cost or expense.

- 7. Except as expressly modified by this Amendment, all terms and conditions of the Agreement shall remain in full force and effect.


Signatures of Authorized Representatives:

SUPERIOR COURT OF CALIFORNIA, COUNTY OF SAN DIEGO

  
MICHAEL M. RODDY  
CHIEF EXECUTIVE OFFICER

Date: 5-13, 2014

VOICES FOR CHILDREN

  
SHARON M. LAWRENCE  
PRESIDENT/  
CHIEF EXECUTIVE OFFICER

Date: 5-1, 2014

**EXHIBIT B**

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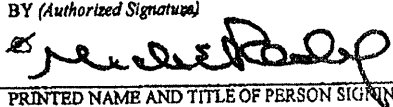

AGREEMENT NUMBER  
**[CH4423-13]**

1. In this agreement (the "Agreement"), the term "VFC" refers to the organization Voices for Children, a nonprofit organization, and the term "Court" refers to the **Superior Court of California, County of San Diego**.
2. This Agreement becomes effective upon execution of this Agreement by both parties. The Agreement will continue until terminated by either party. The Court may terminate all or part of this Agreement for cause or convenience at any time by giving notice to VFC.
3. The purpose of this Agreement is to establish roles and responsibilities between the parties and to allow VFC the ability to print all juvenile minute orders originating from the REJIS case management system at the VFC office. This print access is being granted to VFC for the purpose of supporting its role of providing child advocates for dependent children of the Court, pursuant to San Diego Superior Court local rule 6.6.4.
4. This Agreement also provides for protection of the confidentiality of the records being accessed. Juvenile records are subject to the confidentiality provisions and privileges of the law and the constitutional right to privacy. (Cal. Const., Art. I, § 1; WIC §§ 346, 676, 827, 10850, 16001.9.)
5. The parties have agreed to a site-to-site, secure VPN connection where the Court will direct REJIS print minute orders to a local printer at the VFC office.
6. The Court shall have no responsibility or liability for costs incurred by VFC in connection with this Agreement.
7. This Agreement incorporates and the parties agree to the attached provisions labeled "Additional Agreement Terms." This Agreement represents the parties' entire understanding regarding its subject matter.
8. The points of contact for this Agreement shall be:

For the Court: Court IT Help Desk; [CourtIT@sdcourt.ca.gov](mailto:CourtIT@sdcourt.ca.gov); (619) 450-7000

For VFC: Jose Guzman; [jguzman@greenbitit.com](mailto:jguzman@greenbitit.com); (858) 876-4248

Teri S. Appelton, Chief Program Officer, Voices for Children  
 Direct Tel: (858) 598-2202  
 FAX Tel: (858) 569-7151  
 Email: [teria@speakupnow.org](mailto:teria@speakupnow.org)

COURT'S SIGNATURE	VOICES FOR CHILDREN SIGNATURE
Superior Court of California, County of San Diego	Voices for Children
BY (Authorized Signature) 	BY (Authorized Signature) 
PRINTED NAME AND TITLE OF PERSON SIGNING Michael Roddy, Executive Officer	PRINTED NAME AND TITLE OF PERSON SIGNING Sharon Lawrence, President/CEO
DATE EXECUTED 12-21-12	DATE EXECUTED 12-19-12
ADDRESS Accounts Payable Department 330 W. Broadway, Room 357 San Diego, CA 92101	ADDRESS 2851 Meadow Lark Drive San Diego, CA 92123

**A. COURT ROLE AND RESPONSIBILITIES**

1. COURT will maintain and support REJIS.
2. COURT will create and establish a printer designation for VFC's printer within the REJIS application framework.
3. COURT will provide VFC with a point of contact for troubleshooting technical issues.
4. COURT will notify VFC of any changes or outages that could affect VFC REJIS print operations.
5. COURT will route all minute orders being generated out of REJIS to the VFC printer.
6. COURT will not provide technical support regarding the sustaining operation of VFC's printer or infrastructure equipment.
7. COURT responsibility to maintain REJIS printing functionality ends at the firewall interface and availability of the COURT side of the IPsec tunnel.

**B. VFC ROLE AND RESPONSIBILITIES**

1. VFC will maintain and not alter VPN connection or IP parameters associated with the VFC firewall, internal network or printer.
2. VFC will provide COURT a current point of contact for troubleshooting technical issues.
3. VFC will provide its own support for all infrastructure equipment and printer, including NAT translations and internal routing.
4. VFC will provide all of its own print supplies related to its printer.
5. VFC will maintain the following security protocols related to the handling of confidential juvenile information:
  - i. VFC shall not share information from the minute orders with any person or entity other than VFC staff and volunteers unless VFC first obtains permission from the Court.
  - ii. VFC shall maintain the confidentiality of the minute orders and the information contained therein, and shall use them only to the extent necessary to support VFC's role of providing, training, and supervising volunteers to serve as CASAs in the Court.
  - iii. Any unauthorized disclosure of confidential information or failure to comply with the terms of this Agreement may result in the immediate termination of this Agreement.
  - iv. This Agreement is not intended to replace, nullify, or conflict with any order of the Court or any existing policies of the Health and Human Services Agency, Child Welfare Services, the San Diego County Juvenile Probation Department, or any other public or private agency.
  - v. VFC shall comply with any and all orders of the Court relating to VFC's access to and use of this information.

**C. CHANGES.** VFC may not alter, add to, or otherwise modify this Agreement. This Agreement may be amended, supplemented, or otherwise modified only in writing and signed by the Court's authorized representative.

**D. INDEMNITY.** VFC WILL INDEMNIFY AND HOLD HARMLESS THE COURT, OTHER CALIFORNIA JUDICIAL BRANCH ENTITIES, AND THEIR OFFICERS, AGENTS, AND EMPLOYEES FROM AND AGAINST ALL CLAIMS, LOSSES, AND EXPENSES, INCLUDING ATTORNEYS' FEES AND COSTS, THAT ARISE OUT OF AN ACT OR OMISSION OF VFC, ITS AGENTS, EMPLOYEES, INDEPENDENT CONTRACTORS, VOLUNTEERS, OR SUB-CONTRACTORS IN THE PERFORMANCE OF THIS AGREEMENT. THIS INDEMNITY APPLIES REGARDLESS OF THE THEORY OF LIABILITY ON WHICH A CLAIM IS MADE OR A LOSS OCCURS. THIS INDEMNITY WILL SURVIVE THE EXPIRATION OR TERMINATION OF THIS AGREEMENT, ACCEPTANCE OF SERVICES, AND DELIVERY AND ACCEPTANCE OF WORK PRODUCT. THIS INDEMNITY DOES NOT COVER CLAIMS, LOSSES OR EXPENSES TO THE EXTENT THEY ARISE OUT OF THE GROSS NEGLIGENCE OF THE COURT.

**E. TERMINATION.** The Court may terminate all or part of this Agreement for cause or convenience at any time by giving notice to VFC.

**F. INSURANCE.** VFC will maintain insurance that is sufficient in scope and amount to permit VFC to pay in the ordinary course of business all insurable claims, losses and expenses, including insurable claims, losses and expenses that arise out of VFC's performance of this Agreement. VFC will maintain employer's liability and workers' compensation coverage at statutory levels covering all employees and volunteers performing work under this Agreement.

**G. REPRESENTATIONS.** VFC represents and warrants the following: (i) VFC complies with all federal, state, city, and local laws, rules, and regulations, including the federal Americans with Disabilities Act of 1990, California's Fair Employment and Housing Act, and Government Code Sections 16645-16649; (ii) VFC does not unlawfully discriminate against any employee or applicant for employment because of race, religion, color, national origin, ancestry, disability (mental or physical, including HIV or AIDS), medical condition (including cancer or genetic characteristics), request for family and medical care leave, marital or domestic partner status, age (over 40), sex (including gender identity) or sexual orientation; (iii) VFC does not engage in unlawful harassment, including sexual harassment, with respect to any persons with whom VFC may interact in the performance of this Agreement; (iv) VFC will take all reasonable steps to prevent unlawful harassment from occurring; (v) no more than one, final unappealable finding of contempt of court by a federal court has been issued against VFC within the immediately preceding two-year period because of VFC's failure to comply with an order of a federal court requiring VFC to comply with an order of the National Labor Relations Board (this representation is made under penalty of perjury); (vi) VFC has authority to enter into and perform its obligations under this Agreement; (vii) if VFC is a corporation, limited liability company, or limited partnership and this Agreement will be performed in California, VFC is qualified to do business and in good standing in California; and (viii) VFC is not an expatriate corporation or subsidiary of an expatriate corporation within the meaning of Public Contract Code ("PCC") section 10286.1, and is eligible to contract with the Court. VFC will take all action necessary to ensure that the representations in this section remain true during the performance of this Agreement. VFC must give written notice of its nondiscrimination obligations under this section to labor organizations with which it has a collective bargaining or other agreement.

**H. MISCELLANEOUS.** VFC is an independent contractor and VFC will take all action available to VFC to prevent VFC, and its agents and employees, from being treated under the law as agents or employees of the Court. VFC will not assign, subcontract or delegate its obligations under this Agreement without the prior written consent of the Court, and any attempted assignment, subcontract, or delegation without such prior



not limited to." The parties shall attempt in good faith to resolve informally and promptly any dispute that arises under this Agreement. VFC irrevocably consents to personal jurisdiction in the courts of the State of California, and any legal action filed by VFC in connection with a dispute under this Agreement must be filed in San Diego County, California, which will be the sole venue for any such action. If any part of this Agreement is held unenforceable, all other parts remain enforceable. All headings are for reference purposes only and do not affect the interpretation of this Agreement. A party's waiver of enforcement of any of this Agreement's terms or conditions will be effective only if it is in writing. A party's specific waiver will not constitute a waiver by that party of any earlier, concurrent, or later breach or default. VFC may not make a public announcement, or issue any press release or other writing, related to this Agreement without first obtaining the Court's prior written approval, which may be denied for any or no reason.

## Grant Scoring Review

### Grant Staff Review # 1 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 9

**Goals:** 9

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 9

**Budget:** 8

**Key Partners/Collaborations:** 9

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**Total Score:** 71.00

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**Reviewer Comments:** Aligned with the District's strategic focus area of Healthcare Infrastructure and Services. Aside from Court appointed referrals, CASA's are instrumental in advocating for the primary and behavioral healthcare services for foster children residing in the Coachella Valley. CASA's are a critical piece of these vulnerable children's welfare, even more so with the increased and new barriers to healthcare and increased health needs with the onset of the COVID-19 pandemic.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 19.5 (2 of 2)

Grant Program Staff Review Stage: 71 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 39 (2 of 2)

Grant Program Staff Review Stage: 213 (3 of 3)

**Total average proposal score: 90.5/100**

## Grant Scoring Review

### Grant Staff Review # 2 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 9

**Goals:** 9

**Proposed Evaluation Plan:** 8

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 10

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**Total Score:** 72.00

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**Reviewer Comments:** Voices for Children helps to advocate and support children after being placed in foster care. They fight for their health and wellbeing, so they are not placed and forgotten in an overburdened system. With foster children being more susceptible to unaddressed, poor mental and physical health conditions, they need continued support to thrive and learn to prepare for life after the foster care system. COVID-19 continues to impact our community and exacerbate already challenging needs of vulnerable populations. Our funds focus on supporting 20 Coachella Valley children for a year and advance the District's efforts around increasing access to care.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 19.5 (2 of 2)

Grant Program Staff Review Stage: 71 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 39 (2 of 2)

Grant Program Staff Review Stage: 213 (3 of 3)

**Total average proposal score: 90.5/100**

## Grant Scoring Review

### Grant Staff Review # 3 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 9

**Goals:** 8

**Proposed Evaluation Plan:** 8

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 9

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**Total Score:** 70.00

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**Reviewer Comments:** Voices For Children and their Court Appointed Special Advocates (CASA) provide an invaluable service to foster children. These CASA's become an ally and advocate for the foster children as they try navigate the judicial and foster system. CASA's also connect foster children with much need health and wellness resources, along with guidance as they prepare to leave the foster system. Desert Healthcare District funding will provide 20 foster children with their own CASA, who will have a lifelong impact in the life of these children.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 19.5 (2 of 2)

Grant Program Staff Review Stage: 71 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 39 (2 of 2)

Grant Program Staff Review Stage: 213 (3 of 3)

**Total average proposal score: 90.5/100**

## Grant Scoring Review

### Fiscal Staff Review # 1 of 2

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**Fiduciary Compliance:** 9

**Financial Stability:** 10

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**Total Score:** 19.00

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**Reviewer Comments:** Fiduciary Compliance - Strong Balance Sheet & Current Ratio. However, the organization experienced net loss in 2019 and is trending a net loss in 2020.

Financial Stability - Organization possesses strong financial statements and has very diverse funding for the project. \$40,000 ask is 4% of the program budget.

### **Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 19.5 (2 of 2)

Grant Program Staff Review Stage: 71 (3 of 3)

### **Sum of all Reviews:**

Fiscal Staff Review Stage: 39 (2 of 2)

Grant Program Staff Review Stage: 213 (3 of 3)

**Total average proposal score: 90.5/100**

## Grant Scoring Review

### Fiscal Staff Review # 2 of 2

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**Fiduciary Compliance:** 10

**Financial Stability:** 10

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**Total Score:** 20.00

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**Reviewer Comments:** Financial audits demonstrate appropriate controls are in place, and financial ratios indicate sufficient assets to meet liabilities. Project budget lists several diverse funding sources to meet program goals with requested funding level reasonable in relation to overall project and organizational budgets.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 19.5 (2 of 2)

Grant Program Staff Review Stage: 71 (3 of 3)

### **Sum of all Reviews:**

Fiscal Staff Review Stage: 39 (2 of 2)

Grant Program Staff Review Stage: 213 (3 of 3)

**Total average proposal score: 90.5/100**



## FY 2020-2021: Grant Application Scoring Rubric



Category	Meets expectations <i>(10-6 points)</i>	Does not meet expectations <i>(0-5 points)</i>
<b>Programmatic Review</b>		
<b>Executive Summary</b> (10 points)	The applicant <b>includes and describes</b> the project’s mission and vision, the target population the project will serve, the expected benefits to the community, the need for the project in the community with proposed evidence-based methods, interventions, and strategies that are realistic, attainable, effective, and outcome-oriented.	The applicant is unclear or <b>does not include or describe</b> the project’s mission and vision, the target population the project will serve, the expected benefits to the community, the need for the project in the community with proposed evidence-based methods, interventions, and strategies that are realistic, attainable, effective, and outcome-oriented.
<b>Community Need &amp; Alignment</b> (10 points)	The applicant <b>identifies and defines a specific need(s)</b> for the project within the identified community and effectively describes the alignment of that need to one of the Desert Healthcare District and Foundation five strategic focus areas by using one or more of the following: data, case studies, interviews, focus group results, media coverage, etc.	The applicant <b>does not sufficiently identify or describe a need</b> for the project and/or its alignment to one of the Desert Healthcare District and Foundation five strategic focus areas by using one or more of the following: data, case studies, interviews, focus group results, media coverage, etc.
<b>Goals</b> (10 points)	The applicant has provided SMART goals with an evaluation plan that is comprehensively developed. The <b>SMART</b> goals are <b>specific, measurable, ambitious, realistic, and time-bound</b> , and the evaluation plan will accurately measure the project’s effectiveness and impact.	The applicant has provided very limited goals and evaluation plans. The goals <b>are not specific, measurable, ambitious, realistic, time-bound goals</b> and will not measure the project’s effectiveness or impact.

<p><b>Proposed Program/Project Evaluation Plan</b> (10 points)</p>	<p>The applicant <b>provides a detailed plan of action for evaluation</b> that includes both qualitative and/or quantitative assessment(s). The plan includes well-defined data reporting mechanisms and/or a clear and transparent narrative.</p> <ul style="list-style-type: none"> <li>• Evaluation measures and methods are clear; the applicant defines how they envision success.</li> <li>• Evaluation is in alignment with the SMART goals of the project.</li> <li>• An explanation is provided on how the data collected from the project will be utilized for future programming, partnerships, and/or funding.</li> </ul>	<p>The applicant <b>does not provide, or vaguely describes, a plan of action</b> with limited qualitative and/or quantitative assessment(s). The plan includes poorly defined data reporting mechanisms and/or a narrative.</p> <ul style="list-style-type: none"> <li>• Evaluation measures and methods are not clear; the applicant vaguely defines how they envision success.</li> <li>• Evaluation is not in alignment with the SMART goals of the project.</li> <li>• An explanation is not provided on how the data collected from the project will be utilized.</li> </ul>
<p><b>Applicant Capacity and Infrastructure to Execute Proposal</b> (10 points)</p>	<p>The applicant <b>includes examples that demonstrate</b> that the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.). The <b>applicant demonstrates</b> reliability for this kind of work (strength, a history or track record of achievements, related mission, and letters of support)</p>	<p>The applicant <b>does not include examples that demonstrate</b> the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.). The <b>applicant is limited in its ability to demonstrate</b> reliability for this kind of work (strength, a history or track record of achievements, related mission, and letters of support)</p>
<p><b>Organization Sustainability</b> (10 Points)</p>	<p>The applicant <b>demonstrates</b> that it has a current Strategic Plan with measurable outcomes and includes the proposed program. The applicant demonstrates strong Board engagement, governance, and fundraising support.</p>	<p>The applicant <b>does not sufficiently demonstrate</b> that it has a current Strategic Plan with measurable outcomes. The proposed program is not identified in the current Strategic Plan and the applicant organization has limited Board engagement, governance, and fundraising support.</p>



<p><b>Budget</b> (10 points)</p>	<p>The budget is <b>specific</b> and <b>reasonable</b>, and all items <b>align</b> with the described project. The proposed budget is accurate, cost-effective, and linked to activities and outcomes.</p> <ul style="list-style-type: none"> <li>• There are no unexplained amounts.</li> <li>• The overall significance of the project, including the relationship between benefits and/or participants to the programmatic costs are reasonable.</li> <li>• All line items are identified clearly in the budget narrative.</li> <li>• The budget shows committed, in-kind, or other funds that have been identified, secured, and in place to support the project.</li> </ul>	<p>The budget is <b>not specific</b> and/or <b>reasonable</b>, and the items are <b>poorly aligned</b> with the described project. The budget is included in the application but seems incomplete or not reflective of actual costs.</p> <ul style="list-style-type: none"> <li>• There are unexplained amounts.</li> <li>• The overall significance of the project, including the relationship between benefits and/or participants to the programmatic costs are not reasonable.</li> <li>• Line items are not clearly defined in the budget narrative.</li> <li>• The budget does not show committed, in-kind, or other funds that have been identified, secured, and in place to support the project.</li> </ul>
<p><b>Key Partners / Collaboration</b> (10 points)</p>	<p>The proposal <b>demonstrates a collaborative process</b> that includes multiple community partners involved in planning and implementation, with contributions from collaborators articulated in detail via letters of support and/or memorandums of understanding.</p>	<p>The proposal <b>does not demonstrate a collaborative process</b> and it does not involve multiple community partners in planning and implementation. Potential for collaboration exists but is not articulated.</p>
<p><b>Fiscal Review</b></p>		
<p><b>Fiduciary Compliance</b> (10 Points)</p>	<p><b>The applicant demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through unmodified audited financial statements produced in a timely fashion, positive cash flow at the end of each fiscal year, asset ratio meets required debt load, and the Board reviews financial statements regularly.</p>	<p><b>The applicant does not demonstrate</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through audited financial statements. Positive cash flow at the end of each fiscal year is not consistent. and the Board does not review financials regularly.</p>

<p><b>Financial Stability</b> (10 Points)</p>	<p>Funding sources for operations and programs are from multiple sources and <b>are driven by a strategic plan</b> for stability for both short- and long-term growth. Fund development and/or business plan is in place to identify future sources of funding. The requested grant amount is <b>reasonable</b> in comparison to the overall organizational budget.</p>	<p>Source of funds for operations and programs are from limited sources and <b>are not driven by a strategic plan</b>. There is <b>no plan</b> for stability in place currently, including a fund development plan and/or business plan. The requested grant amount is <b>unreasonable</b> in comparison to the overall organizational operating budget.</p>
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Total Score: \_\_\_\_ / 100

**Recommendation:**

- Fully Fund
- Partially Fund – Possible restrictions/conditions
- No Funding