



**DESERT HEALTHCARE DISTRICT  
PROGRAM COMMITTEE  
Program Committee Meeting  
January 12, 2021  
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/88494762379?pwd=TFI0eElnZF4ZnNgcjcrTlVclh1Zz09>

**Password: 886612**

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: 884 9476 2379**

<i>Page(s)</i>	<b>AGENDA</b>	<i>Item Type</i>
	<b>I. Call to Order</b> – Director Evett PerezGil, Committee Chairperson	
<b>1-2</b>	<b>II. Approval of Agenda</b>	<b>Action</b>
<b>3-5</b>	<b>III. Meeting Minutes</b> 1. December 08, 2020	<b>Action</b>
	<b>IV. 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	
<b>6-10 11</b>	<b>V. Old Business</b> 1. Funding Requests Schedule 2. Grant Payment Schedule 3. Lift to Rise Rental Assistance Program	Information Information Information
	<b>VI. Program Updates</b> 1. Community Health Needs Assessment and Health Improvement Plan	Information
<b>12-34</b>	<b>VII. Grant Funding Requests</b> 1. Consideration to approve Grant #1136 – Inland Empire Ronald McDonald House – Temporary Housing and Family Support Services – \$119,432	<b>Action</b>



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- |              |  |               |
|--------------|--|---------------|
| <b>35-59</b> | 2. Consideration to approve Grant #1147 – Alzheimer’s Association Critical Program Support – \$33,264  | <b>Action</b> |
| <b>60-86</b> | 3. Consideration to approve Grant #1162 – Cove Communities Senior Association dba The Joslyn Center – Joslyn Wellness Center Program Support – \$109,130 | <b>Action</b> |

**VIII. Committee Member Comments** Information

**IX. Adjournment**  
Next Scheduled Meeting February 09, 2021

**DESERT HEALTHCARE DISTRICT  
PROGRAM COMMITTEE MEETING  
MEETING MINUTES  
December 08, 2020**

<b>Directors 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	Conrado E. Bázaga, 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	

<b>AGENDA ITEMS</b>	<b>DISCUSSION</b>	<b>ACTION</b>
<b>I. Call to Order</b>	The meeting was called to order at 12:02 p.m. by Chair PerezGil.	
<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 Director Rogers to approve the agenda. Motion passed unanimously.</b>
<b>III. Meeting Minutes</b> <b>1. November 10, 2020</b>	Chair PerezGil asked for a motion to approve the November 10, 2020 meeting minutes.	<b>Moved and seconded by Director Rogers and Vice-President Borja to approve the November 10, 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, progress and final reports schedule, and the grants payment schedule.	
<b>2. Progress and Final Reports Schedule</b>	Vice-President Borja inquired on One Future Coachella Valley's progress report, Well in the Desert's mini grant request, Clinicas de Salud's Rapid ID Now testing, and Coachella Valley Association of Governments (CVAG) \$700k funding match request to sustain the CV Housing First Program, which	
<b>3. Grants Payment Schedule</b>		

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	Donna Craig, Chief Program Officer responded.	
<b>VI. Program Staff Updates</b> <b>1. Coachella Valley Housing Catalyst Fund – A Bold Housing Investment Solution, Lift to Rise &amp; Riverside County Housing Authority</b>	<p>Dr. Bárzaga, CEO, explained the Workshop on Housing as a Social Determinant of Health and its impact on the Coachella Valley, introducing Heather Vaikona, CEO, Lift to Rise, who provided an overview of the team’s previous presentation of the Housing Catalyst Fund.</p> <p>The Catalyst team answered questions of the committee members, for instance, Vice-President Borja’s concerns with development, such as whether the units will remain vacant, used for Airbnb purposes, and the non-profit status of the developers and other entities.</p>	
<b>VII. Grant Funding Requests</b> <b>1. Voices for Children – Consideration to approve Grant #1149 – \$40,000 for the Court Appointed Special Advocates (CASA) Program</b>	<p>Donna Craig, Chief Program Officer, described the grant request for Voices for Children to assist 2,000 youth in the Coachella Valley.</p> <p>Jessica Munoz, Voices for Children, described the program’s growth with virtual volunteer training to serve additional children, and the request to assist additional youth in the Valley.</p>	<p><b>Moved and seconded by Vice-President and Director Rogers to approve Grant #1149 – \$40,000 for the Court Appointed Special Advocates (CASA) Program. Motion passed unanimously.</b></p>
<b>VII. Committee Members Comments</b>	Director Rogers explained that at the last Board meeting, the staff clarified that community members would join the Program Committee for specific	

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PROGRAM COMMITTEE MEETING  
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December 08, 2020**

	grant requests. Dr. Bárzaga described the new policy to eliminate the community members on all committees, but the committee will encourage public participation per the policy, and staff will reach out to experts when appropriate to review grants for input and feedback.	
<b>V. Adjournment</b>	Chair PerezGil adjourned the meeting at 1:23 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: \_\_\_\_\_  
 Evett PerezGil, Chair/Director  
 Program Committee

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

## FUNDING REQUESTS UPDATE for January 2020

**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>Blood Bank of San Bernardino and Riverside Counties</b>	LOI received requesting \$150,000 to support the purchase of two bloodmobiles, which cost \$250,000 each.	Staff will be scheduling a proposal review.	District	Healthcare Infrastructure and Services
<b>Jewish Family Service of the Desert</b>	LOI received requesting \$80,000 to support staffing positions for mental health counseling	Stage 2 – the application – has been generated	District	Behavioral Health/Mental Health
<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 JANUARY:</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.	District	Healthcare Infrastructure and Services

		Nothing further has been received from the organization.		
<b>Youth Leadership Institute</b>	LOI received requesting \$30,000 Que Madre Program	<b>UPDATE FOR JANUARY: <i>withdrawn by applicant</i></b> as agency's efforts are tied to funding through the CV Equity Collaborative's COVID-19 outreach and education campaign in underserved areas and populations of the Coachella Valley		Behavioral Health/Mental Health
<b>CVAG</b>	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.	<b>UPDATE FOR JANUARY:</b> Staff met with Greg Rodriguez to discuss the request, bringing up concerns that included: <ul style="list-style-type: none"> <li>disparities in the amount of the request of \$700K from the District vs. only \$100k from the cities and \$300K from the County.</li> <li>the District's \$54,500 investment in Barbara Poppe's assessment and recommendations for a collective and collaborative approach to end homelessness in</li> </ul>	District	Homelessness

		<p>the CV (and approved by DHCD board and CVAG Homelessness Committee) when in November, CVAG approved a recommendation by Greg Rodriguez to <i>discontinue</i> efforts to create a formal collaborative structure specifically for the CV and instead support the regional efforts being pursued by Riverside County and the Continuum of Care.</p> <ul style="list-style-type: none"> <li>• By dismantling the effort to create a collaborative the District now must take care of own needs and those of the CBOs that take care of the homeless (Martha's, CVRM,</li> </ul>		
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		<p>etc.) as there is enough need out there that requires our contributions.</p> <p>Staff will be bringing forward a recommendation for funding at a lower amount with specific and targeted deliverables.</p>		
<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.	<p><b>UPDATE FOR JANUARY:</b> after review by the grants team, it was determined that this request did not fall within the scope of the District's focus areas and was declined.</p>	District	Vital Human Services to People with Chronic conditions
<b>City of Palm Springs</b>	LOI received requesting \$243,600 to support one Behavioral Health Specialist, one Mental Health Peer Specialist, Case Managers & Mental Health Peer Specialist	<p><b>UPDATE FOR JANUARY:</b> The LOI is currently on hold as the City has requested a 2 month no cost grant extension for the current open grant. The request will be on the agenda for the 1/26 board meeting.</p>	District	Homelessness
<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>Martha's Village &amp; Kitchen</b>	LOI received requesting \$200,896 to support the resources necessary to serve an expanded number of homeless individuals from within the DHCD's Western borders with evidence based best practices such as Housing First	<b>UPDATE FOR JANUARY:</b> Stage 2, the application, was generated, and MVK will concentrate the request on 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 February Program Committee meeting.		
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DESERT HEALTHCARE DISTRICT							
OUTSTANDING GRANTS AND GRANT PAYMENT SCHEDULE							
As of 12/31/20							
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	\$ 157,500	\$ 227,500	
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	
	3 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	\$ 113,586	\$ 5,324	
	3 Unexpended funds Grant #1023					\$ (5,324)	
2019-1021-BOD-11-26-19	Neuro Vitality Center - Community Based Adult Services Program - 6 Months	\$ 143,787		\$ 79,083	\$ 50,323	\$ 28,760	
	1 Unexpended funds Grant #1021					\$ (28,760)	
2020-1045-BOD-03-24-20	FIND 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	\$ 22,500	\$ 5,000	
2020-1057-BOD-05-26-20	Desert Cancer Foundation - Patient Assistance Program	\$ 150,000		\$ 82,500	\$ 67,500	\$ 15,000	
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	\$ 9,000	\$ 11,000	
2020-1149-BOD-12-15-20	1 Voices for Children - Court Appointed Special Advocate Program - 1 Yr		\$ 40,000	\$ 40,000	\$ -	\$ 40,000	
<b>TOTAL GRANTS</b>		<b>\$ 13,106,979</b>	<b>\$ 610,000</b>	<b>\$ 10,358,358</b>	<b>\$ 1,497,683</b>	<b>\$ 8,826,445</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>12/31/2020</b>
<b>Amount granted through December 31, 2020:</b>			\$ (610,000)		2131	\$	2,166,446
Mini Grants:	1132, 1163		\$ (10,000)		2281	\$	6,660,000
Financial Audits of Non-Profits	8/15/20		\$ (5,000)				
Net adj - Grants not used:	1017, 1021, 1023		\$ 34,229		<b>Total</b>		<b>\$ 8,826,446</b>
Matching external grant contributions			\$ -				<b>(0)</b>
<b>Balance available for Grants/Programs</b>			<b>\$ 3,409,229</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	\$ (561,240)	\$ 938,760			
2	Behavioral Health/Mental Health	\$ 500,000		\$ 500,000			
3	Homelessness	\$ 500,000	\$ 469	\$ 500,469			
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>\$ (590,771)</b>	<b>\$ 3,409,229</b>			



**Date:** 1/12/2021

**To:** Program Committee

**Subject:** Grant # 1136 Inland Empire Ronald McDonald House

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**Grant Request:** Temporary Housing and Family Support Services

**Amount Requested:** \$119,432.00

**Project Period:** 2/1/2021 to 1/31/2022

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

The Inland Empire Ronald McDonald House's (IERMH) primary objective is to boost the innate strengths of families during a time of crisis, keeping them close together and allowing them to focus on their child's health and well-being and stay within minutes of the hospital. Of the families served, at least 85% are low income. The IE Ronald McDonald House provides a "home away from home" for these families ensuring they have access to life-saving pediatric treatments, mental health care services, and on-site Family Support Services team and minimize the financial strain a family would experience trying to stay local in a hotel. The family is provided a private guest room, private bathroom, shared common areas, basic essentials and much more.

The IE Ronald McDonald House continues to serve families during the pandemic. Due to COVID-19 occupancy limits and restrictions in place, the number of families served has dropped; however, the IERMH has adapted to support as many families as possible within the limits of the pandemic. From January to November 2020, they have accommodated 347 stay requests. Of that number, 78 of the families were from Coachella Valley, representing 264 people using in total 1,522 nights. These numbers show that more than 22% of the overall occupancy is coming from the Coachella Valley.

The District's funds will help to offset the cost of the family stay (house program), the Family Support Services program, and expenses incurred traveling to and from a child's bedside for those families from the Coachella Valley.

**Strategic Plan Alignment:**

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



**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; La Quinta; Palm Desert; Palm Springs; Thermal; Thousand Palms; 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 \$119,432.00 be approved.
- Recommendation with modifications
- Deny

## Full Grant Application Summary

### **Inland Empire Ronald McDonald House, Grant #1136**

#### **About the Organization**

Inland Empire Ronald McDonald House  
 11365 Anderson Street  
 Loma Linda, CA 92354  
 Tel:  
<http://11365 Anderson Street>

#### **Primary Contact:**

Karen Hooper  
 Tel: (909) 747-1260  
[khooper@rmhcsc.org](mailto:khooper@rmhcsc.org)

#### **Historical (approved Requests)**

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
2018	Temporary Housing and Family Support Services Program	\$200,000	Grant	4/16/2019	

#### **Program/Project Information**

**Project Title:** Temporary Housing and Family Support Services

**Start Date:** 2/1/2021 **End Date:** 1/31/2022

**Term:** 12 months

**Total Project Budget:** \$198,244

**Requested Amount:** \$119,432

#### **Executive Summary:**

The mission of the Inland Empire Ronald McDonald House is to provide comfort, care and support to children and families in southern California. Our Visions is a community where children and their families embrace life and healing with a sense of hope, enthusiasm, courage and joy.

Our overall goal is to continue to provide temporary housing for up to 54 families nightly, 365 days a year, 24/7, provide accommodations for every stay request from a family who needs our services; to help alleviate the financial burden placed on families when they need to relocate for short and long periods of time; To provide supportive services through our Family Support Services (FSS) program giving every family the opportunity to meet with one of the FSS team members to assist them with emotional support; provide resources needed to navigate through the challenges faced from losing their home or apartment, increased medical bills, lack of funds, and assist them with making community support connections; provide supportive services to our medical partners to assist those pediatric parents that choose to stay bedside by providing more than 300 Ronald McDonald House comfort bedside bags, provide food and gas cards as

available; and to provide access to local resources, educational material and tools for families to gain a broader knowledge of their child's medical condition and treatment.

Our target population is any family whose child, age newborn to 21 years of age, is receiving medical treatment at the nearby children's hospital and other surrounding medical facilities providing pediatric medical care. If the child receiving treatment is an in-patient or out-patient and it is closer for the family to stay here at the IERMH than their house to the hospital to obtain the specialized care, they are eligible to submit a stay request. Since opening in 1996, we have accommodated over 27,000 stay requests. During any given year 20% of those families served through the program come from the Coachella Valley. As we continue to serve the families during the pandemic, while our number of families served has dropped due to restrictions that were in place, from January to November we still have accommodated 347 stay requests. Of that number, the statistics for Coachella Valley are 78 families, 264 people, using in total 1,522 nights, more than 22% of the overall occupancy. Since we are now in Phase 3, we are beginning to see our occupancy slowly rise and we are confident that we will meet the goal set for 2021. As the environment improves, we are optimistic that we will exceed the goal expected for Coachella Valley families. The average cost savings to a family each day they remain at the RMH is \$150/day for room meals and essentials for two, savings to the families rise if the family is larger. This does not include the savings of the value of the services received through our FSS program.

Studies have shown that parental absence is detrimental to the recovery of a seriously ill child. Studies have also shown when parents are coping well with a child's illness that the child does better. By staying at the House along with our supportive services, it offers the family the opportunity to be near their child and actively participate in their child's care and recovery. It gives families the opportunity to have easier accessibility to doctors, medical library, mental health resources, support groups and local resources. Studies also show that being close to their child affords the parents the chance to participate more readily in educational training for care and treatment of the patient. What has also been learned is the even more important psychosocial benefits that are facilitated by allowing families to get to know others going through similar circumstances, from being rested so they are better equipped to deal with the stress of their child's medical condition, and from being able to stay in a supportive environment that keeps them together with their child and other members of their family. When families return home it is an easier transition for them to return to normalcy.

Ronald McDonald House services are aligned in regards to the Health of our community. Our services reach out to all families, including those who are low-income to ensure the basic needs of shelter and food are met during their time with us. When families travel from great distances to be near their child, having a place to stay with little or no expenses plays a significant role in reducing a families financial burden. Our services help improve the quality of life of both a child and their families by alleviating some of the stress associated with having a child in the hospital.

A study published in the Journal of Health Organization and Management finds that a strong majority of hospital administrators agree that Ronald McDonald Houses play a significant and important role in family-centered care for children with serious medical

needs. The study also suggests that many hospital leaders worldwide believe that their partnership with RMH enhances the patient experience, enhances hospital marketing and reach, and reduces staff and economic burdens on the hospital associated with assisting patient families with affordable lodging and other accommodations.

NOTE: On the current financial statement attached, which is our consolidated report for October, it does not yet reflect the PPP money of approximately \$210,000, and we were recently approved and awarded the grant from San Manuel Band of Mission Indians for \$200,000. We are expecting these both to post in December, 2020.

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

Our program and services include providing temporary housing for up to 54 families nightly 365 days a year; providing a private guest room with shared common spaces; provide every family with the opportunity to meet with our Family Support Services (FSS) team for emotional support; provide families the resources needed to navigate through the challenges they face, and assist them with making community support connections. IERMH is a vital part of the local healthcare community, offering essential services that ensure families have access to life-saving pediatric treatments at our local children's hospital, and other medical and mental health facilities. Children whose families stay at Ronald McDonald Houses tend to be the sickest, travel the furthest distances for care, and spend the longest time in the hospital. Program goals are: to service every family and child who needs us by providing a safe place to stay; to keep families close to their children during medical treatment; to help alleviate financial burden placed on families when they need to relocate for short and long periods of time; to provide access to local resources, educational material and tools for families to gain a broader knowledge of their child's medical condition and treatment; and provide additional support services through FSS. Twenty percent of the families served annually are from the Coachella Valley referred here by the low desert hospitals for intensive and specialized medical treatments at the Children's Hospital. We have served families from each of the cities in the DHCD geographical area.

### **Strategic Plan Alignment:**

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

### **Program/project description:**

Our primary objective is to boost the innate strengths of families during a time of crisis, keeping them close together and allowing them to focus on their child's health and well-being and stay within minutes of the hospital. 85% plus of the families served are low income. The IE Ronald McDonald House (IERMH) provides a "home away from home" for these families ensuring they have access to life-saving pediatric treatments, mental health care services, and our on-site Family Support Services team and minimize the financial strain a family would experience trying to stay local in a hotel. Most would just sleep in their car. The family is provided a private guest room, private bathroom, and share common areas such as kitchens, pantries, dining, library, play and activity centers, sanctuary, and much more. Basic essentials are also available to the families. Our standard operating model supports families at the IERMH for approximately \$100 per night. This cost does not include the regular meals and activities that are provided to our guests nearly every day. Your funding helps to offset the cost of the family stay



(house program) and our Family Support Services program for those families from the Coachella Valley.

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

In 2019 we serve 1,581 families. Our target population is any family whose child is receiving treatment, newborn to 21 years of age is eligible for our program and services. We have served many families across the population stated: Veterans, single parent, same sex couples, seniors, homeless, LGBTQ, uninsured/underinsured, low income/no income, etc. Our racial/ethnic groups for 2019 were as follows:

- African American (10%)
- Asian/Pacific Islander (4%)
- Bi-Racial (12%)
- Caucasian (26%)
- Hispanic (41%)
- Middle Eastern (1%)
- Native American (1%)
- Other (3%)
- Declined to State (2%)

**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; La Quinta; Palm Desert; Palm Springs; Thermal; Thousand Palms; Bermuda Dunes

**Age Group:**

- (0-5) Infants
- (06-17) Children
- (18-24) Youth
- (25-64) Adults
- (65+) Seniors

**Total Number of District Residents Served:**

325

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> By January 31, 2022, 100 Coachella Valley families will be provided temporary housing for a total of 1,600 nights to alleviate the financial burden placed on these families who have to temporally relocate.</p>	<p><b>Evaluation #1:</b> Action and evaluation of Stay Requests happens on a day to day basis. Monthly reports are reviewed to evaluate support to the Coachella Valley families. The stay requests are submitted to the IE Ronald McDonald House by the social workers at our partnering hospital and other medical facilities that utilize our program. The requests are evaluated and prioritized based on distance and diagnosis of the child and</p>
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	<p>confirmation of completed medical protocol. Once all is met, those families are then scheduled to check in to the Ronald McDonald House. They are entered in to our Guest Information System where all pertinent data is entered and tracked. This data is then used to produce our monthly occupancy reports for our Chapter office, Board of Trustees, as well as for necessary reporting to our grantors. To ensure that families know of our program and services, House brochures are taken to the hospital on a regular basis to stock the children's hospital guest services desk, the nurses stations on each pediatric floor, and all the social workers have brochures on hand to provide to families. We will also be placing brochures at the Loma Linda University Health center in Indio.</p>
<p><b>Goal #2:</b> By January 31, 2022, 80% of Coachella Valley families served will receive supportive services through the Family Support Services (FSS) program.</p>	<p><b>Evaluation #2:</b> The FSS team keeps robust statistical data in regards to which families they meet with, hours in family meetings, support groups held, weekly check-ins, hours out and about the House, hours providing therapeutic fun clubs for the children, parents and families, and education workshops for families and staff. This data is readily available and will be shared at each of the reporting periods. Surveys are also taken when the family is at the House and three months after returning home to collect further data.</p> <p>We currently have a team of four providing these services. They work throughout the House, creating supportive environments wherever and whenever families or members of the House staff need emotional support, compassion and care. FSS is available to the house and families seven days a week, 24 hours a day, every day of the year. These services are offered in English/Spanish. The House has translation services in place to accommodate any potential language needed. Evaluations have shown that families appreciate and feel the supportive impact of FSS. They have</p>

	demonstrated the importance of the program as part of the spectrum of care families receive.
<b>Goal #3:</b> Provide supportive services to our medical partners to assist those pediatric parents from Coachella Valley that choose to stay bedside by providing comfort bedside bags, provide food and gas cards as available. The goal is to support an additional 50 families through this service. By January 31, 2022, \$25.00 gas cards will be provided to 50 Coachella Valley families to assist with travel expense due to financial hardship.	<b>Evaluation #3:</b> Each of our partnering medical facilities has a request sheet which outlines items of support that they can request for families. They turn those in to our Operations team to fulfill. Our Operations team, working with the community and volunteers, assemble the bags to fit the needs requested and distribute appropriately. A spreadsheet is kept of the number given to each medical partner, typically the Director of Social Work, in support of those families staying bedside. Data is collected from the social workers as to the distribution on their end. The food cards and gas cards are given to the families who are struggling with finances and have to travel back and forth from home to hospital. These cards are logged and tracked as to which families received which type card and the value given. These cards would be tracked specifically for Coachella Valley families.
<b>Goal #5:</b>	<b>Evaluation #5:</b>

### Proposed Program / Project Evaluation Plan

Our projects will be carefully evaluated by monitoring and collecting data on various levels. The House program collects surveys from every family regarding their guest experience and how it has impacted the child undergoing treatment and the family as a whole. The comments provided are used to access where changes need to be made or what other types of support a family is requesting that we could potentially provide. For example, we had families that were struggling with transportation to get back and forth to one of our other medical facilities. After evaluating, we established a shuttle service specifically to that location. FSS also does independent surveys of the families seen through their program and a follow-up survey is done three months after the family has returned home. All survey data and comments are used to evaluate the effectiveness of each of our programs and to determine possible enhancements. The House also captures statistical data on each family (person), i.e., # of families served, # of in or out-patients, diagnosis, # of adults, # of children, ethnicity, income level, place of origin, # of new families, # of returning families, etc. FSS also collects statistical data such as # of hours in family meetings and support groups, # of check-ins with families, # of hours spent in therapeutic fun clubs for children, parents, and families, # of hours providing educational workshops, # of hours putting on activities. We will have very rich data to share on all these dimensions and look forward to reporting this information to you.

## **Organizational Capacity and Sustainability**

### **Organizational Capacity**

Our current staff consists of the following full-time staff: Executive Director, Admin Assistance, Operations Director, Operations Manager for Guest Services, Guest Services Lead, Facilities Associate, Housekeeping Supervisor, two Lead Housekeepers, Development Director, Development Manager, Event Coordinator, and a Volunteer Coordinator. Our part-time staff includes: five Housekeepers, eight Guest Services Associates, and a Community Liaison. Our FSS team consist of a licensed phycologist who oversees four Marital, Family, Therapy interns. The program capacity is serving up to 54 families nightly, however, being in the midst of COVID, moving through our reinstatement plan and the current state of the county, we have seen lower occupancy through the program. We are currently in Phase 3 of our reinstatement plan which allows us to go to 75% occupancy. One of the main components of our reinstatement is that any new family requesting to stay, must take a COVID test and provide us with the negative results prior to check-in. We are also doing daily/hourly disinfecting protocol to ensure the safety and overall health of staff and families.

### **Organizational Sustainability:**

Within our Strategic Plan we have four core priorities. They are 1) Meeting Community Needs, 2) Funding the Mission, 3) Building Relationships, and 4) Brand Awareness. Our number one focus is "Meeting Community Needs" which encompasses continually enhancing the impact of our services to ensure no family is ever turned away and are fully supported during their entire stay. This included completion of our expansion. With 54 guest rooms, we have not turned away a family due to lack of space. This program provides access to specialized health care and mental health care that is not available in their local community. Other focuses are enhancing cost effectiveness of services, providing the best possible guest service/experience, minimizing their financial burden, providing external and internal resources such as our Family Support Services program. All priorities are set with clear intentional efforts of keeping families together to help kids heal and cope better. Our board consists of 20 members that live throughout our various services areas. They are a fundraising board and last year were instrumental in helping us to raise over \$400,000. The board has a "give or get" policy requiring a minimum a \$3,000 annual gift and many far exceed.

### **Partnerships:**

#### **Key Partners:**

Loma Linda University Children's Hospital supports through in-kind gifts such as security support, use of their sports center, spa, and pool for use by families free of charge, sponsorships of events and local shuttle. Our mission partner, McDonald's provides annual support through their round-up program, Walk for Kids giving, and representation on our Board of Trustees. Sponsors for our annual Walk for Kids include the Fontana Foundation of Hope, iHerb Foundation, Bass Pro, and IngramMicro. Our key supporters of our Adopt-a-Room fundraiser include Stater Bros. Charities, Teamsters, Lake Arrowhead Rotary, Cabazon Band of Mission Indians, Chino Lions, SR Machining. Other funders include Merrell Foundation, Vickter Foundation, Versacare, and San Manuel Band of Mission Indians. We are hopeful that the Berger

Foundation will continue support for 2021 supporting Coachella Valley families. The impact of COVID has presented a challenge in our fundraising efforts and some of the key foundations have chosen to support other critical areas. We've also shifted our on-site events to virtual events and we've realized a significant decrease in attendance and donations. We were able to host our annual golf tournament in November which was very successful.

Continued strategy for fundraising include donor engagement and cultivation strengthening our major donors, recurring gifts, and planned giving to build monthly and long term stability. We continue to work with talented committee members ensuring the success of our remaining events for 2020 whether done virtually or in person. We recently activated a "Circle of Healing" campaign to attract monthly giving donors. We remain focused on increasing the number of grant requests submitted with a goal of increasing applications and support by 10% each year. Our community liaison works directly with the broader community to develop and execute new third party fundraising opportunities and increase the workplace giving through our "Heroes" program.

## Line Item Budget

Costs  
2020

## Operational

PROGRAM OPERATIONS - Coachella Valley Families		Total Program/Project Budget	Funds from Other Sources <b>Detail on sheet 3</b>	Amount Requested from DHCD
<b>Total Staffing Costs</b> <b>Detail on sheet 2</b>		136242	40000	96242
<b>Equipment (itemize)</b>				
1	Guest Business Center Computers/Supplies	420		210
2	Website Mgmt & Software Maintenance			0
3	Equipment Leases / Rentals	960		480
4	Equipment Purchases			0
<b>Supplies (itemize)</b>				
1	Program Supplies	2800		1400
2	Office Supplies	1008		504
3	Publications/Dues/Subscriptions			0
<b>Printing/Duplication</b>		250		125
<b>Mailing/Postage</b>		100		50
<b>Travel/Mileage/Auto Expense</b>		500		250
<b>Education/Training</b>				0
<b>Office/Rent/Mortgage/Property Tax</b>				0
<b>Telephone/Fax/Internet</b>		4636		2318
<b>Utilities</b>		10481		5240
<b>Insurance</b>		14187		0
<b>Other facility costs not described above (itemize)</b>				
1	Repair & Maintenance	8001		4000
2	Janitorial	2040		1020
3	Waste Management	1500		750
4	Gardening	1234		0
<b>Other program costs not described above (itemize)</b>				
1	Family Support Services Program	8160		4080
2	Guest Food/Services/Transportation	3025		1513
3	Bank Charges/Misc. Expense			0
4	Business & Staff Meetings/Meals			0
5	Professional Fees	200		0
6	Event Fundraising Costs			0
7	Gas Cards-Supplemental Transportation Support	2500	0	1250
<b>Total Program Budget</b>		<b>198244</b>	<b>40000</b>	<b>119432</b>
<b>Budget Narrative</b>	Our program budget includes all the amenities and services that family have accessible to them during their stay at the IE Ronald McDonald House (IERMH) and encompasses all expenses that are the make-up of their guest room, private restroom, and all common areas within the IERMH that includes, five full kitchens, pantries, refrigeration/freezers, dining space, living room, outdoor play space, library, toddler play area, family activity center, movie room, arts/craft center, guest business center, sanctuary, and day use shower and nap room. The guest business center and computers are available to the patients, siblings, and adults who need to continue their schooling while at the IERMH or for those parents needing to do research on their child's diagnosis. We also have our Family Support Services program which offers comprehensive support to parents and their children. They provide compassionate emotional support, welcome meetings to orient families as well as offering additional or impromptu support meetings. Guest transportation is provided for those families needing to get to appointments at other clinical sites. We also offer weekend shuttle services around town and to the local shopping center. We also like to have gas and food cards on hand for the families who struggle to get back and forth from their home to the hospital and need personal groceries. The biggest percentage of our families come from more than 50 miles away. Many of our families struggle financially and one of the parents tries to stay employed and therefore, will go back and forth to their hometown and back to Loma Linda when time permits to be with their family and child. Guest Food is based on the expectation that we will be successful obtaining funding for our Meals of Love program through grant support. This funding helps stock the freezer and common refrigerator with basic fresh/frozen food items for the families beyond what is typically donated. It also supplements meals on those days not provided by outside groups or cancelled last minute. Right now, our goal is to have one meal a day for at least five out of the seven days. Our hope, through additional funding, would be to increase meals to one a day, seven days a week.			

## Line Item Budget Staffing Costs

Staff Salaries		Annual Salary	% of Time Allocated to Program	Actual Program Salary (based on serving Coachella Valley families)	Amount of Salary Paid by DHCD Grant
<b>Employee Position/Title</b>					
1	Operational Staff	231118	100%	46223	26223
2	Housekeeping Staff	219152	100%	43830	33830
3	Guest Services Staff	230947	100%	46189	36189
4	Development Staff	299850			0
5	Chapter Support Staff	62015			0
6	Social Security/Medicare Taxes	79827			0
7	Benefits	40276			0
8	Insurances	151990			0
<b>Total Employee Benefits</b>		1315175		136242	
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total ›</b>	<b>96242</b>
<b>Budget Narrative</b>	<p>The Operations staff consists of four full-time staff which includes the Operations Director, Operations Manager-Guest Services, Facilities Associate, and Volunteer Coordinator. The housekeeping staff consists of three full-time housekeepers and five part-time. The guest services associates (GSA) team consists of one full-time and seven part-time GSA's. Both housekeepers and GSA's are on shift 24/7. The Development team consists of the Development Director, Development Manager, Event Coordinator, and part-time Community Liaison. The Executive Director is reflected on both operations and development. The Chapter Support Staff consists of shared expenses for IT Management/Support, Accounting, and Website Management/Support. I am happy to provide job descriptions for each of these positions upon request.</p>				
<b>Budget Narrative</b>	<p>Benefits costs are the total dollars matched against the employees contribution in to their 401K plan.</p>				
Professional Services / Consultants		Hourly Rate	Hours/Week	Monthly Fee	Fees Paid by DHCD Grant
<b>Company and Staff Title</b>					
1					0
2					0
3					0
4					
5					
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total ›</b>	<b>0</b>
<b>Budget Narrative</b>					

## Line Item Budget Other Program Funds

Other funding received (actual or projected) SPECIFIC to this program/project - <b>Coachella Valley Families Only</b>			Amount
<b>Fees</b>			0
<b>Donations</b>			0
<b>Grants (List Organizations)</b>			
2021 projected	1	Berger Foundation	40000
	2		
	4		
	5		
	6		
	8		
	9		
<b>Fundraising (describe nature of fundraiser)</b>			
2021 projected	1		
	2		
	3		
	4		
	5		
<b>Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)</b>			
	1		
	2		
	3		
	4		
	5		
	6		
	7		
<b>Total funding in addition to DHCD request</b>			<b>40000</b>
<b>Budget Narrative</b>	<p style="color: red;">We continue to work daily to build and cultivate our current donor relationships as well as establishing new donors. Our grant supporters have been strong and we are always looking for new opportunities to engage foundations that are in all our service areas. Our strongest support in the Coachella Valley are DHCD and Berger Foundation. Our four signature fundraisers have grown over the years, however, it is certainly different in light of the pandemic. Our other areas of revenue/fundraising have dipped a bit as well, however, our team continues to reach out to foster strong support in each of these areas and work hard to meet our revenue goals.</p>		



The H.N.  
and  
Frances C.



BERGER  
FOUNDATION

January 23, 2020

Ms. Karen Hooper

Ronald McDonald House Loma Linda  
11365 Anderson St.  
Loma Linda, CA 92354

Re: Grant No. 20-03

Dear Ms. Hooper:

In regard to our grant agreement letter dated January 8, 2020, Grant No. 20-03, the H.N. and Frances C. Berger Foundation is pleased to make a grant in the amount of \$40,000.00 to the Ronald McDonald House Loma Linda.

The grant is to support your temporary housing program, as outlined in our agreement letter.

The check for \$40,000.00 is being transmitted with this letter.

We wish you outstanding success in this endeavor and look forward to hearing from you in the near future.

Sincerely,

**H.N. AND FRANCES C. BERGER FOUNDATION**



Catharine N. Reed  
Vice President Charitable Programs

CNM/rm

P.O. Box 13390  
Palm Desert CA  
92255-3390  
TEL (760) 341-5293  
FAX (760) 341-3518

## **Grant Scoring Review**

### **Grant Staff Review # 1 of 3**

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**Executive Summary:** 10

**Community Need and Alignment:** 9

**Goals:** 9

**Proposed Evaluation Plan:** 8

**Applicant Capacity and Infrastructure:** 10

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 10

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**Total Score:** 74.00

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**Reviewer Comments:** Inland Empire Ronald McDonald House provides emotional support and financial assistance through temporary housing, navigation services, and resources to families whose child is receiving medical treatment. Our funds target the specific families living in Coachella Valley. Throughout the COVID-19 pandemic, the I.E. Ronald McDonald House has adapted their family accommodations to follow all regulations and procedures set forth by the State and County while still safely supporting families across the Valley. Their mission directly aligns with the Desert Healthcare District's focus on increasing access to healthcare for traditionally underserved populations as they do not only provide support care for children but the support care for entire families.

### **Response Notes:**

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#### **Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 72.6666666666666666666666666667 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 218 (3 of 3)

**Total average proposal score: 90/100**

**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:** 9
- Applicant Capacity and Infrastructure:** 9
- Organizational Sustainability:** 9
- Budget:** 9
- Key Partners/Collaborations:** 9

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**Total Score:** 72.00

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**Reviewer Comments:** The applicant provides a safe haven for families with children undergoing procedures and intensive and specialized medical treatments at Children's Hospital. In particular, Coachella Valley families must go outside of the Valley to seek services as these intensive and specialized medical treatments, such as oncology, transplants, etc. are not available in the CV. The applicant provides a much-needed service to fill the gaps.

**Response Notes:**

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**Average Review Score:**

- Fiscal Staff Review Stage: 17.5 (2 of 2)
- Grant Program Staff Review Stage: 72.666666666666666666666666666667 (3 of 3)

**Sum of all Reviews:**

- Fiscal Staff Review Stage: 35 (2 of 2)
- Grant Program Staff Review Stage: 218 (3 of 3)

**Total average proposal score: 90/100**

# Grant Scoring Review

## Grant Staff Review # 3 of 3

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- Executive Summary: 10
- Community Need and Alignment: 9
- Goals: 9
- Proposed Evaluation Plan: 9
- Applicant Capacity and Infrastructure: 9
- Organizational Sustainability: 8
- Budget: 8
- Key Partners/Collaborations: 10

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Total Score: 72.00

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**Reviewer Comments:** The Inland Empire Ronald McDonald House has been providing crucial services to families whose children need specialized care at children's hospitals. Outside of providing families with a place to stay during the duration of their child's medical treatment, they provide case management to ensure the families are connected with additional programs and services. The DHCD grant funds will only assist Coachella Valley families. I support fully funding this grant application.

**Response Notes:**

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**Average Review Score:**

- Fiscal Staff Review Stage: 17.5 (2 of 2)
- Grant Program Staff Review Stage: 72.6666666666666666666666666667 (3 of 3)

**Sum of all Reviews:**

- Fiscal Staff Review Stage: 35 (2 of 2)
- Grant Program Staff Review Stage: 218 (3 of 3)

**Total average proposal score: 90/100**

**Grant Scoring Review**

**Fiscal Staff Review # 1 of 2**

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**Fiduciary Compliance:** 9

**Financial Stability:** 9

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**Total Score:** 18.00

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**Reviewer Comments:** Grantee possesses strong 12/31/2019 financial statements with annual audit report approved by the Board

Quick Ratio 15:1 demonstrates ability to cover current liabilities

Current year Revenue and Net Income is down significantly

Grant request represents 60% of the total budget. No diversity of sources of additional funding.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 72.6666666666666666666666666667 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 218 (3 of 3)

**Total average proposal score: 90/100**

**Grant Scoring Review**

**Fiscal Staff Review # 2 of 2**

---

**Fiduciary Compliance:** 9

**Financial Stability:** 8

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**Total Score:** 17.00

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**Reviewer Comments:** Unmodified audited financial statements reviewed and approved by Board with assets to meet liabilities and positive cash flow demonstrated. Funding comes from multiple sources but strategic plan only documented short-term goals. Grant amount is reasonable in comparison with overall organizational budget.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 72.666666666666666666666666666667 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 218 (3 of 3)

**Total average proposal score: 90/100**



## FY 2020-2021: Grant Application Scoring Rubric



Category	Meets expectations (10-6 points)	Does not meet expectations (0-5 points)
<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 of 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><u>SMART</u></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><u>are not specific, measurable, ambitious, realistic, time-bound goals</u></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.).</p> <p>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.).</p> <p>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>



<b>Budget</b> (10 points)	<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>
<b>Key Partners / Collaboration</b> (10 points)	<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>
<b>Fiscal Review</b>		
<b>Fiduciary Compliance</b> (10 Points)	<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>

<b>Financial Stability</b> (10 Points)	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.	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.
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Total Score: \_\_\_\_/ 100

Recommendation:

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



**Date:** 1/12/2021

**To:** Program Committee

**Subject:** Grant # 1147 Alzheimer's Association

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**Grant Request:** Alzheimer's Association Critical Support

**Amount Requested:** \$33,264.00

**Project Period:** 2/1/2021 to 1/31/2022

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

The Alzheimer's Association provides free, critically needed outreach, education, and support services for Coachella Valley individuals with Alzheimer's or dementia and their families. Specific services provided by the Alzheimer's Association include referral services, general community education, specialized family caregiving, comprehensive caregiver training, support groups, counseling, and individualized Case Consultations.

Since COVID-19 hit in March, the Alzheimer's Association has experienced three times the typical requests for Care Consultations and crisis management as there has been significant increases with social and emotional isolation and financial hardships. Staff quickly transitioned to working remotely and training themselves, and their clients, on virtual platforms to maintain and continue support services in addition to developing safe opportunities for social engagements.

The funds provided by Desert Healthcare District will be used to continue offering services, to a particularly vulnerable population, by partially funding their Program and Education Manager and helping with costs incurred for their 4-week comprehensive Caregiver EssentialALZ training program.

**Strategic Plan Alignment:**

Vital Human Services to People with Chronic Conditions / Strengthened organizational capacity

**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Indian Wells; La Quinta; Palm Desert; Palm Springs; Rancho Mirage; 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 \$33,264.00 be approved.
- Recommendation with modifications
- Deny

## **Full Grant Application Summary**

### **Alzheimer's Association, Grant #1147**

#### **About the Organization**

Alzheimer's Association  
74020 Alessandro Drive, Suite A  
Palm Desert, California 92260  
Tel: 760-328-6767  
Fax: (760) 328-2747  
<http://www.alz.org/socal>

#### **Primary Contact:**

Cortney Weir  
Tel: (760) 996-0006  
Fax: (760) 328-2747  
[cjweir@alz.org](mailto:cjweir@alz.org)

#### **Historical (approved Requests)**

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
1999		\$3,500	Grant	12/31/1999	
2004	Spanish outreach network	\$37,000	Grant	11/22/2004	Grant budget
2008	New Directions in Dementia	\$1,000	CEO Discretionary	11/21/2008	CEO Discretionary
2009	Latino Healthcare Project	\$53,595	Improving Lives	10/27/2009	Grant budget

#### **Program/Project Information**

**Project Title:** Alzheimer's Association Critical Support

**Start Date:** 2/1/2021 **End Date:** 1/31/2022

**Term:** 12 months

**Total Project Budget:** \$152,400

**Requested Amount:** \$33,264

#### **Executive Summary:**

The Alzheimer's Association has been serving the Coachella Valley with free programs and services, education and outreach, and care and support for over 20 years. As there is still no cure for Alzheimer's disease, nor any meaningful treatments to help slow or mitigate the progression of its devastating effects, our services are crucially needed to ensure that our desert population living with Alzheimer's and other dementias have the support, education and resources to navigate what can often be a very long journey. The Alzheimer's Association is a 40 year old organization recognized globally as the

leader in providing strategic, evidence based programming that arms our constituents with the tools, information and education necessary to succeed in an extremely challenging and taxing situation. 70% of caregivers will end up with a serious health concern directly related to the stressful dynamic of caregiving, and 18% of those will pass away before their loved one with dementia. Alzheimer's is the single most expensive disease a family can bear, and it routinely devastates the carefully planned for and protected savings that a family accumulated over their working life. This disease devastates families; financially, emotionally, physically and in every other possible way. Our ability to provide free education, care and support to these families can often make the difference between successful navigation of this terrible new normal, and tragedy. Through programs like our Caregiver EssentialALZ and Care Consultations, we are able to empower our families living with Alzheimer's with strategies, tools and education, that can be as basic as learning to effectively communicate with your loved one who's dementia is progressing, or as potentially life saving as knowing what signs to look for that might indicate a serious health problem (cancer, diabetes, etc.) in a person who cannot communicate their physical changes or discomfort. No one is born knowing how to care for a loved one whose mind is slipping away, and the attendant feelings of frustration, hopelessness, isolation and despair can overwhelm the strongest individual, and test the longest bonds. Providing families with resources, tools and support to help them manage those feelings and ensure that they know they are not alone and have a community behind them is a life changing experience for our participants. Empowering them with information and education enables them to take back some of the control that they have lost, and to be proactive in the care of their loved one and themselves. This dynamic has a ripple effect through our community, as families connect together through our programming and become resources for each other, drawing strength from their shared experience and knowledge. We are extremely grateful to be serving our Alzheimer's community here in the desert, humbled by the many community partners who support our efforts and appreciative of the board and staff of the Desert Healthcare District for considering our request for funding during this extremely difficult year for our constituents.

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

In the midst of this pandemic, Alzheimer's disease marches firmly on, destroying the finances and lives of millions of families across the United States. (Nearly 6 million people in the United States have an Alzheimer's diagnosis, and it is currently the 3rd leading cause of death in California and the 2nd leading cause of death for women in California). In the Coachella Valley, as our population skews older, we have an unusually high incidence of families living with Alzheimer's and other forms of dementia. Because of this, the Alzheimer's Association is a crucially needed resource for education, care and support services. In Fiscal Year 20, our small staff of 4, together with our many community volunteers, served 1,491 unduplicated contacts. This number typically represents an additional 1-3 family members who we will also serve in some capacity. The contacts are also only counted one time, although our constituents typically interact with us often on a weekly or monthly basis through our various programs. Our programs and services are a lifeline for this community, providing not just education and support, but life changing social opportunities for people with disease who have lost their typical outlets and opportunities to interact and engage. Our Songshine music program, Art Expressions program and ALZ Explorers programs allow both the caregivers and their loved ones to be active participants in their community and

to have meaningful interactions that can help mitigate disease progression and behavioral issues. Before the pandemic, our office was a thriving center of community, resources, engagement and hope. Since the pandemic, we have striven to meet our people where we can, and are dedicated daily to providing them the best care possible within the restrictions necessary to ensure that this most vulnerable population is protected. We will not abandon them.

### **Strategic Plan Alignment:**

Vital Human Services to People with Chronic Conditions / Strengthened organizational capacity

### **Program/project description:**

The Alzheimer's Association has provided critically needed outreach and education, care and support services for the Coachella Valley for over 20 years, and for all of that time, we have never charged for any of these programs. Our local community office has been a hub of activity, support and social engagement for the Alzheimer's and dementia community, which typically included the person with disease (PWD), their primary and secondary family caregivers, and extended family who are interested and vested in their care. In addition to providing information and referral services, we also offer general community education, specialized family caregiving, such as our 4 week comprehensive series Caregiver EssentiALZ, support groups and individual Care Consultations with families in need of short term and long term planning, as well as crisis counseling. Since March, and the impact of Covid19 on our valley, we have seen a sharp and alarming trend with our Alzheimer's patients and families. The isolation, financial hardships and general stressors of caregiving have been compounded exponentially in this vulnerable population due to the pandemic. While the shut downs and social changes, job losses, etc. have been difficult for many people, the Alzheimer's population has been hit particularly hard, as they were very dependent on having the ability to engage, receive education and support and social outlets for both the caregivers and PWD through our services. Once we settled in to our new reality of working remotely, we saw a sharp uptick in calls to our local office, requests for Care Consultations, crisis management strategies and just general despondency and hopelessness. In addition to shifting all of our programs and services to virtual platforms, and providing extensive training to our senior population on utilizing these new forms of program delivery, we quickly realized that we had to add socialization opportunities for our community to have breaks, opportunities to see one another and our staff, have things to look forward to for both the caregivers and PWD and a means to check in on health and safety concerns. We are currently offering 2 educational opportunities per week, in addition to our outreach to the general population (rotaries, chambers, etc), as well as 3 different social engagement opportunities for both the caregivers and PWD. We have also run several sessions of a new, strategic educational program, "Caregiving During Covid", which addressed the particular safety concerns and protocols regarding the pandemic. We have moved all of our support groups to virtual platforms and negotiated the transitionary period for our seniors into a smoothly running system. We have also tripled the number of Care Consultations that we were doing pre-pandemic. The funds provided by Desert Healthcare District will be used to continue our service to this particularly vulnerable population at a time when our own fundraising efforts have also been severely impacted as our Reason to Hope event scheduled for April 2020 had to be cancelled and our Walk to End Alzheimer's is

tracking severely behind. Sustaining and expanding our outreach to the community at this most critical time is of utmost importance to the thousands of families living with Alzheimer's and other dementias in the Coachella Valley.

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

Our demographic is as varied and diverse as the Coachella Valley itself. Alzheimer's disease does not discriminate and as a result, our constituents come from every pocket and group in the Coachella Valley. Because the majority of our clients served are seniors and their families, our clientele is older, and many of them are veterans. We estimate that the LGBTQ community makes up about 36% of our program participant base, and we have specific outreach to the LatinX, LGBTQ, African American and Native American populations in the CV.

**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Indian Wells; La Quinta; Palm Desert; Palm Springs; Rancho Mirage; Bermuda Dunes

**Age Group:**

(25-64) Adults  
(65+) Seniors

**Total Number of District Residents Served:**

468

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> To continue to deliver Care Consultations to individual families. These entail a private individualized planning session with a Program Manager who does a full assessment of the current situation, challenges, and very often crisis management and mitigation. There is also significant follow up with these families, and multiple Care Consultations that take place as their loved one's disease progresses and needs change. Goal: To deliver 100 unduplicated Care Consultations to District families, which incorporates an average of two additional family members for a total of 300 District residents served.</p>	<p><b>Evaluation #1:</b> Data will be collected and recorded for each individual Care Consultation via our proprietary data management tool, Personify, including information about each family, address, situation, plan of action, plan of follow up and subsequent contact.</p>
<p><b>Goal #2:</b> Goal: To deliver approximately 150 follow up Care Consultations with families who are</p>	<p><b>Evaluation #2:</b> Data will be collected and recorded for each individual Care Consultation via our</p>



established with us through a previous CC to monitor progress, changing circumstances and challenges related to their loved ones disease progression.	proprietary data management tool, Personify, including information about each family, address, situation, plan of action, plan of follow up and subsequent contact.
<b>Goal #3:</b> Goal: To deliver a new Caregiver EssentiALZ 4 week series each month in 2021, with an average of 14 caregivers in attendance during each session. This will be a total of 168 district residents/families served, who will then go on through the programmatic continuum of services we provide, including ongoing support groups, additional targeted education and the opportunity to participate with their loved one in social engagement programs.	<b>Evaluation #3:</b> Data will be collected and recorded for each attendee every month and entered into Personify and evaluations completed by each participant both pre and post the class series will determine the effectiveness of the information delivered on the caregiver's knowledge base, comfort level, overall stress level and ability to be successful and effective in their caregiver role.
<b>Goal #4:</b>	<b>Evaluation #4:</b>
<b>Goal #5:</b>	<b>Evaluation #5:</b>

### **Proposed Program / Project Evaluation Plan**

Utilizing our proprietary Association internal database, Personify, the Alzheimer's Association carefully collects data from every interaction that occurs between our staff, volunteers and community members. For each Care Consultation a record is made for the family in question, with detailed notes regarding their specific situation, challenges, and the resources, strategies and action plan that is developed with their Program Manager. Additionally, for every education class, data is entered regarding the name, email and zip code of each participant in attendance, whether in person or virtually. All class participants are also given a post class evaluation, including a pre and post survey for the Caregiver EssentiALZ 4 part series which measures their growth in knowledge, comfort level and overall stress level before they begin the series and after it is completed. After the class concludes, most Caregiver EssentiALZ class groups form their own Support Group, or migrate into an existing Support Group, where their knowledge base and self assessed stress levels are also routinely monitored. The Association collects unduplicated numbers with regard to family members utilizing our services; EG one family may access several of our programs and services multiple times, (attend a support group every week for several months/years, attend an occasional educational or social engagement class, participate in one of more Care Consultation. For our purposes of increasing our reach and focusing on serving the greatest number of families living with Alzheimer's, we count each of these instances as an unduplicated contact only one time for our yearly total number of families served. For the purposes of this grant request, some averages have been made based on the actual number of district residents that are being served by the programs in question.

### **Organizational Capacity and Sustainability**

### **Organizational Capacity**

We have 2 full time Program Managers, and one will be funded 50% through this request to deliver our Care Consultations and Caregiver EssentiALZ programs. This will represent approximately 19 hours per week to prep for the programs/consultations, market the programs, deliver the programs, and complete the necessary data entry and follow up for each.

### **Organizational Sustainability:**

The programs in question, Care Consultations and our 4 week Caregiver EssentiALZ program are integral parts of our overall programmatic activity as part of the Care and Support pillar of delivering education and support directly to family caregivers. The additional pillars are Concern and Awareness, Advocacy and Public Policy, Diversity and Inclusion, Accelerating Research and Increasing Funding

### **Partnerships:**

#### **Key Partners:**

KESQ, News Channel 3: (A community partner with a representative on our Advisory Council), have given us in kind donations of air time and production for a 30 second PSA detailing our programs and services locally.

Ombudsmans Office Long Term Care: Have provided speakers for our Caregiver EssentiALZ class regarding residential placement criteria and dangers to look for/be aware of in placing a loved one.

Home Care Assistance and Senior Living Options: Have provided speakers for Caregiver EssentiALZ class for information on in-home care options.

Edward Jones: Advisory Council member Eric Mosser has delivered the Alzheimer's Association/Edward Jones "Legal and Financial Planning" presentation to our Caregiver EssentiALZ class participants, which details the plans they should have in place for their loved one with Alzheimer's.

Eisenhower Health: Has hosted sessions of our Caregiver EssentiALZ series at their adult day care site, run by our staff in conjunction with our long running support group at EH.

Various Yoga Practitioners: Have delivered a brief chair yoga presentation as part of our stress relieving module during week 3 of Caregiver EssentiALZ

Various Therapists/Counselors: Have led a discussion about grief, stress and self care during Caregiver EssentiALZ

## **Caregiver EssentiALZ Program Curriculum**

Caregiver EssentiALZ is a four week, comprehensive series designed to prepare family caregivers for the important role of caring for a loved one through their Alzheimer's or dementia journey. Based on a combination of two proprietary Alzheimer's Association programs entitled "Living with Alzheimer's" and "The Savvy Caregiver", this class was created to arm the caregiver with the knowledge base, tools and strategies necessary to enable them to be successful in fulfilling this role for their loved one. A special emphasis on caregiver self-care and stress management has been incorporated throughout, including weekly "Me Moments", where simple stress relieving techniques will be presented and practiced. Participants take a self-assessment of their knowledge base and comfort level before the class series commences, and once it is completed.

### **Week One: Welcome, Establishing Your Baseline, Understanding the Disease and Common Challenges**

1. Welcome and Introductions- *Interactive Activity*
2. Stages of the Disease-Understanding Alzheimer's
3. Symptoms and Care Needs Associated with the Different Stages of Alzheimer's
4. Seven Stages of Grief (Kubler-Ross Model) Self Assessment-*Interactive Discussion*
5. Behavioral Changes
6. Confusion – Tips and Suggestions on Managing this Behavior
7. Repetition – Tips and Suggestions on Managing this Behavior
8. Agitation and Aggression – Tips and Suggestions on Managing this Behavior
9. Hallucinations – Tips and Suggestions on Managing this Behavior
10. Suspicion – Tips and Suggestions on Managing this Behavior
11. Sundowning- Tips and Suggestions on Managing this Behavior
12. Sleep Issues - Tips and Suggestions on Managing this Behavior
13. ME Moment – Breathing Exercise for Stress Management
14. Homework – Practice Deep Breathing and Try New Tip or Response to Manage Behavior

### **Week Two: The Importance of Self Care and Stress Management, Accepting Your New Role and Relationship, How to Effectively Communicate**

1. Check-In and Homework-*Interactive Activity*
2. The Importance of Self-Care
3. Stressors and Their Consequences
4. Caregiver Stress Check-*Interactive Activity*
5. Self Care Ideas
6. Taking Care of You
7. Stress Management
8. Accepting Help
9. Changes in Your Relationship
10. Changes in Your Role as a Caregiver
11. Changes in Intimacy
12. Changes in Communication
13. Compassionate and Effective Communication-Tips and Strategies
14. ME Moment – Aromatherapy (*Guest Speaker when available*)
15. Homework – Me Moment and Try a New Communication or Stress Management Technique

### **Week Three: Daily Life Planning, Tips and Strategies**

1. Check-In and Homework-*Interactive Activity*
2. Importance of Day to Day Planning
3. How to Make a Solid Plan
4. Mealtime Solutions
5. Grooming Tips and Tricks
6. Bathing 101
7. Dental Care Tips
8. Toileting Tips and Resources
9. Pleasant Events to Share with your Loved One- Interactive Activity
10. Staying Safe in the Home-Review Safety Check List
11. Managing Trips to the Hospital
12. Preparing for Emergencies
13. Driving – Having the Conversation About When It Is Unsafe
14. ME Moment – Visualization and Meditation (*Guest Speaker when available*)
15. Homework – Complete your Home Safety Check List

### **Week Four: Long Term Planning and Resources**

1. Check-In and Homework-*Interactive Activity*
2. Legal and Financial Planning- *Guest Speaker, Professional Advisor*
3. Legal Tips and Resources
4. Financial Tips and Resources
5. Informal Care Options – Family and Friends
6. Respite Care – The Importance of Respite and local Resources
7. In-Home Care – Tips and Resources
8. Senior Living Options – local CCRC and Different Options- *Guest Speaker, Placement Professional*
9. Alzheimer's Association Resources and Help Line
10. Alzheimer's Support Groups and Education
11. Local Resource Guide
12. ME Moment – Chair Yoga-*Guest Speaker, Professional Yogi*
13. Celebration – End of Class-*Interactive Social Celebration and Conversation*

## 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>		152,400	90000	30000
<b>Equipment (itemize)</b>				
	1			0
	2			0
	3			0
	4			0
<b>Supplies (itemize)</b>				
	1	Materials printed for classes and programs		800
	2			0
	3			0
	4			0
<b>Printing/Duplication</b>				0
<b>Mailing/Postage</b>				0
<b>Travel/Mileage</b>				0
<b>Education/Training</b>				0
<b>Office/Rent/Mortgage</b>				0
<b>Telephone/Fax/Internet</b>				0
<b>Utilities</b>				0
<b>Insurance</b>				0
<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	Indirect Expenses		2,464
	2			
	3			
	4			0
<b>Total Program Budget</b>		<b>152400</b>	<b>90000</b>	<b>33,264</b>
<b>Budget Narrative</b>	<div style="color: red; font-size: small;"> <p>This budget request represents a percentage of the Program and Education Manager's salary based on their job description and their responsibilities as they relate to delivering Care Consultations as well as our 4 week comprehensive program, Caregiver EssentiALZ, which are both now critically focused on managing Covid related crisis situations and education regarding protocols in caregiving during the pandemic.</p> </div>			

## Line Item Budget Staffing Costs

Staff Salaries		Annual Salary	% of Time Allocated to Program	Actual Program Salary	Amount of Salary Paid by DHCD Grant
<b>Employee Position/Title</b>					
1	Program and Education Manager	\$62,000	80%	\$78,740	\$30,000
2					
3					
4					
5					
6					
7					
8					
<b>Total Employee Benefits</b>					
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total »</b>	<b>30000</b>
<b>Budget Narrative</b>	<p style="color: red;">Our Program and Education Manager is tasked with providing community education, outreach, care and support. This includes performing Care Consultations, which are one on one counseling sessions with families for short and long term planning as well as crisis management. Our Program and Education Manager also leads our Caregiver Essential 4 week comprehensive Program which provides a full range of strategies, education and practical tips, as well as community resources for our participants. They also do a tremendous amount of information and referral regarding home safety, crisis management regarding the pandemic, placement and housing counseling and education on effective communication with loved ones, physician's and other services within the community.</p>				
<b>Budget Narrative</b>	<p style="color: red;">The Alzheimer's Association offers comprehensive medical, dental, vision and life insurance benefits at a rate that adds in general 27% onto the employees base salary for the portion paid by the Association. The employee is responsible for approximately 30% of the costs related to these benefits.</p>				
Professional Services / Consultants		Hourly Rate	Hours/Week	Monthly Fee	Fees Paid by DHCD Grant
<b>Company and Staff Title</b>					
1					
2					
3					
4					
5					
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total »</b>	<b>0</b>
<b>Budget Narrative</b>	<p style="color: red;">Please describe in detail the scope of work for each professional service/consultant on this grant.</p>				

Line Item Budget  
Other Program Funds

Other funding received (actual or projected) SPECIFIC to this program/project			Amount
Fees			
Donations			
Grants (List Organizations)			
	1	Willmas Family Foundation	\$10,000
	2	Barker Foundation	\$20,000
	3	Veit Family Foundatioin	\$15,000
	4		
Fundraising (describe nature of fundraiser)			
	1	Walk to End Alzheimer's, November 14, 2020	\$45,000
	2		
Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)			
	1		
	2		
	3		
	4		
Total funding in addition to DHCD request			90000
Budget Narrative	The Grants listed are actual, received amounts for FY21. The Walk to End Alzheimer's is a projected amount, based on our current fundraising to date, and the amount that would be allocated to staff salaries and program support from the Walk.		

## *Jewish Family Service of the Desert*

490 S. Farrell Drive, Suite C208, Palm Springs, CA 92262

PHONE (760) 325-4088 FAX (760) 778-3781 WEB [www.jfsdesert.org](http://www.jfsdesert.org)



Desert Healthcare District  
1140 N. Indian Canyon Drive  
Palm Springs, CA 92262

December 17, 2020

Dear DHCD Board Members,

Jewish Family Service of the Desert (JFS) proudly supports the Alzheimer's Association, Coachella Valley, in their efforts to improve our community.

JFS provides several social services, but we are certainly not experts as it relates to dementia, particularly Alzheimer's disease. To improve the service of our clients dealing with this insidious disease, referrals are made to the experts at the Alzheimer's Association in an effort to tap into their programs. We have seen the benefit provided by the Alzheimer's Association and knowingly continue to make referrals.

The Alzheimer's Association serves a critical need in the Coachella Valley, particularly at this challenging time, as the demographic that they serve is extremely vulnerable to the isolation resulting from COVID-19, and to the virus itself. The support and educational services provided by the staff are critically needed here in the Coachella Valley as they are providing essential services to this fragile population. It is my pleasure to provide an endorsement of their programs and services.

Sincerely,

Kraig Johnson  
Executive Director



December 15, 2020

Desert Healthcare District Foundation  
1140 N. Indian Canyon Drive  
Palm Springs, CA 92262

**Re: Grant Request – Alzheimer’s Association – Letter of Support**

Dear District Board/Foundation Members:

This letter is written in support of the funding request by the Alzheimer’s Association, Coachella Valley, their staff members, volunteers, programs and services.

Through my role as Chief Strategy Officer for Desert Care Network (DCN), I have participated in coordinating with the Alzheimer’s Association to deliver educational programming and support to our healthcare providers and community members via DCN network locations and facilities. I have also worked as a volunteer committee member for this organization and seen first-hand the level of crucial services provided to our desert community and the dedication of their staff and volunteers. DCN has been a proud sponsor of several Alzheimer’s Association events because we recognize the need to bring awareness to this devastating disease.

Additionally, as Mayor of the City of La Quinta, I have had the opportunity to also partner with the Alzheimer’s Association on program delivery throughout the La Quinta service area, including support groups, education, arts and culture, and care and support services. This year, the Greater Coachella Valley Chamber of Commerce presented the Volunteer of the Year award for the City of La Quinta to Mary Lou Green, an Alzheimer’s Association volunteer, for her incredible work for the organization and the clients it serves.

The Alzheimer’s Association is serving a critical need in the Coachella Valley, particularly at this challenging time, as the demographic that they serve is particularly vulnerable to the isolation resulting from COVID-19, and to the virus itself. The support and educational services provided by the staff are critically needed in the Coachella Valley, as they are providing essential services to a very fragile population. It is my pleasure to provide an endorsement of their programs and services, and their community partnerships.

If you need additional information or have any questions regarding the content of this letter, please feel free to contact me through email at [levans@laquintaca.gov](mailto:levans@laquintaca.gov) or at 760-899-3279. Thank you.

Sincerely,

A handwritten signature in blue ink that reads "Linda Evans".

Linda Evans  
Mayor, City of La Quinta



Cove Communities Senior Association

**THE JOSLYN CENTER**

"ENRICHING LIVES EVERY DAY"

73-750 Catalina Way • Palm Desert, California 92260  
760.340.3220 • Fax 760.568.9230

December 15, 2020

Desert Healthcare District  
1140 N. Indian Canyon Drive  
Palm Springs, CA 92262

Dear DHCD Board Members,

This letter is written in support of the grant application of the Alzheimer's Association, Coachella Valley, their staff members, volunteers, programs and services.

The Joslyn Center has worked with the Alzheimer's Association in presenting programs and support to our members and through Joslyn Wellness Center programming. The Alzheimer's Association provides critical services provided to our desert community and The Joslyn Center members and clients.

The Alzheimer's Association is serving a vital need in the Coachella Valley, particularly at this challenging time, as the demographic that they serve is particularly vulnerable to the isolation resulting from COVID-19, and to the virus itself. The support and educational services provided by the staff at the Alzheimer's Association are a crucial component in the Coachella Valley as they are providing essential services to this fragile population. It is my pleasure to provide an endorsement of their programs and services, and their community partnerships.

Sincerely,

Jack Newby  
Executive Director

## **Grant Scoring Review**

### **Grant Staff Review # 1 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:** This organization has been serving Coachella Valley families living with Alzheimer's and other forms of dementia with free programs and services, education and outreach, and care and support. This funding will allow the Program and Education Manager to continue to deliver unduplicated Care Consultations to approximately 250 individual families. This funding will also allow the Program and Education Manager to deliver a new Caregiver EssentiALZ 4 week series each month, for an approximate total of 168 residents/families taking the course.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 18 (2 of 2)

Grant Program Staff Review Stage: 70 (3 of 3)

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

Fiscal Staff Review Stage: 36 (2 of 2)

Grant Program Staff Review Stage: 210 (3 of 3)

**Total average proposal score: 88/100**

## **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:** The Alzheimer's Association proposed grant provides much needed support to individuals suffering with Alzheimer's and their primary and secondary caregivers. A key component of the proposed grant are Care Consultations, where the person with the disease and their caretakers and/or family members meet with a Program Manager to develop an individualized care plan is developed to mitigate the impact of the disease. Once the plan is developed follow-up Care Consultations provide an opportunity to modify or enhance the individual care plan to ensure as the needs of the person with the disease changes so does the care plan. The Caregiver EssentiALZ 4-week class provides caretakers with the tools and on-going support to ensure they provide the best care possible for the person under their care and themselves. DHCD grant dollars will expand these services in this great time of need, and provide much needed support to a vulnerable population and their caretakers. I support fully funding this proposed grant.

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**Response Notes:**

**Average Review Score:**

Fiscal Staff Review Stage: 18 (2 of 2)

Grant Program Staff Review Stage: 70 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 36 (2 of 2)

Grant Program Staff Review Stage: 210 (3 of 3)

**Total average proposal score: 88/100**

## **Grant Scoring Review**

### **Grant Staff Review # 3 of 3**

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**Executive Summary:** 8

**Community Need and Alignment:** 8

**Goals:** 9

**Proposed Evaluation Plan:** 8

**Applicant Capacity and Infrastructure:** 8

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 9

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**Total Score:** 68.00

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**Reviewer Comments:** Alzheimer's Association continues to offer free family and caregiver support to families living with members suffering from Alzheimer's and other dementias. The Alzheimer's Association staff provides the tools, resources, and education to manage and understand the financial, emotional, and physical impact and challenges faced when dealing with Alzheimer's and dementia. Staff meets with families on an ongoing basis to empower them with information and education and offer training sessions directly to caregivers. Amidst the challenges of the pandemic, the Alzheimer's Association adapted their program to continue their support services and increase their capacity to handle a rise in care consultations requests.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 18 (2 of 2)

Grant Program Staff Review Stage: 70 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 36 (2 of 2)

Grant Program Staff Review Stage: 210 (3 of 3)

**Total average proposal score: 88/100**

## **Grant Scoring Review**

### **Fiscal Staff Review # 1 of 2**

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**Fiduciary Compliance:** 9

**Financial Stability:** 8

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**Total Score:** 17.00

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**Reviewer Comments:** Grantee's audit report has an unmodified opinion

Current Ratio of 1:1 Grantee needs financial support

District's grant funding is 22% of the Program Budget and is supported by various other funding sources.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 18 (2 of 2)

Grant Program Staff Review Stage: 70 (3 of 3)

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

Fiscal Staff Review Stage: 36 (2 of 2)

Grant Program Staff Review Stage: 210 (3 of 3)

**Total average proposal score: 88/100**

## **Grant Scoring Review**

### **Fiscal Staff Review # 2 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:** Audited financial statements presented and approved by board in timely fashion and has positive cash flow for latest fiscal year. Strategic plan in place, including 10-year vision, with multiple sources of funding. Grant request is reasonable compared to overall organizational budget.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 18 (2 of 2)

Grant Program Staff Review Stage: 70 (3 of 3)

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

Fiscal Staff Review Stage: 36 (2 of 2)

Grant Program Staff Review Stage: 210 (3 of 3)

**Total average proposal score: 88/100**



## FY 2020-2021: Grant Application Scoring Rubric



Category	Meets expectations (10-6 points)	Does not meet expectations (0-5 points)
<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 of 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.).</p> <p>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.).</p> <p>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>

<b>Budget</b> (10 points)	<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>
<b>Key Partners / Collaboration</b> (10 points)	<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>
<b>Fiscal Review</b>		
<b>Fiduciary Compliance</b> (10 Points)	<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>

<b>Financial Stability</b> (10 Points)	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.	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.
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**Total Score:** \_\_\_\_/ 100    **Recommendation:**

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



**Date:** 1/12/2021

**To:** Program Committee

**Subject:** Grant # 1162 Cove Communities Senior Association dba The Joslyn Center

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**Grant Request:** Joslyn Wellness Center

**Amount Requested:** \$109,130.00

**Project Period:** 2/1/2021 to 1/31/2022

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

The Joslyn Center is requesting support to continue to address two heightened challenges faced by a vulnerable population: mental health support and food security. Both of these focuses directly align with the strategic priorities of the Desert Healthcare District.

Our funds will support Joslyn's Wellness Center's mental health clinicians in providing behavioral health assessments, treatment plans, and continued follow-up counseling care to low-income District seniors.

Additionally, our funds will target food insecurity, through the meals on wheels program, by providing 40 residents up to seven meals weekly for the duration of the grant with wellness checks during meal drop off. The Joslyn Center continues to look for opportunities to expand their reach, increase partnerships, and strengthen sustainability efforts.

**Strategic Plan Alignment:**

Behavioral Health/Mental Health / Increase the number of peer mental health educators

**Geographic Area(s) Served:**

Cathedral City; Coachella; Indio; Indian Wells; La Quinta; Palm Desert; Rancho Mirage; Thousand Palms; 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 \$109,130.00 be approved.
- Recommendation with modifications
- Deny

## Full Grant Application Summary

### **Cove Communities Senior Association dba The Joslyn Center, Grant #1162**

#### **About the Organization**

Cove Communities Senior Association dba The Joslyn Center  
73-750 Catalina Way  
Palm Desert, California 92260  
Tel: 17603403220  
<http://www.joslyncenter.org>

#### **Primary Contact:**

Jack Newby  
Tel: (760) 340-3220  
[jackn@joslyncenter.org](mailto:jackn@joslyncenter.org)

#### **Historical (approved Requests)**

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
1999	grant # 2000-052	\$3,000	Grant	6/30/2000	
2000	grant # 2001-017	\$25,000	Grant	6/30/2001	
2001	grant #s: 2001-005 & 006	\$21,000	Grant	11/20/2001	
2003	historical from COO grant summary	\$80,000	Grant	6/30/2004	
2004	New exercise and dance floor	\$25,000	Grant	11/22/2004	Grant budget
2009	Meals-on-Wheels at Joslyn Senior Center	\$3,580	Improving Lives	3/4/2010	Grant budget
2010	Meals-on-Wheels at Joslyn Center	\$3,858	Food Assistance	8/16/2010	Grant budget
2010	Meals-on-Wheels at Joslyn Center	\$4,000	Food Assistance	10/25/2010	Grant budget
2010	Meals-on-Wheels at Joslyn Center	\$5,000	Food Assistance	3/4/2011	Grant budget
2011	Meals on Wheels at Joslyn Center	\$5,000	Food Assistance	8/8/2011	Grant budget
2011	Meals on Wheels	\$15,000	Food Assistance	11/4/2011	Grant budget
2017	Joslyn Wellness Center Educational Programming	\$5,000	Mini-Grant	4/4/2018	Grant budget
2018	Joslyn Wellness Center Senior Behavioral Services Program	\$112,050	Grant	10/23/2018	Grant budget
2019	Joslyn Center Nutrition Programs - Meals on Wheels and Penny's Pantry	\$10,000	Grant	4/1/2020	

**Program/Project Information****Project Title:** Joslyn Wellness Center**Start Date:** 2/1/2021 **End Date:** 1/31/2022**Term:** 12 months**Total Project Budget:** \$247,630**Requested Amount:** \$109,130**Executive Summary:**

This request supports the evidence/research-based and innovative Joslyn Wellness Center counseling program; increases community collaboration with local senior centers and senior-focused organizations; and utilizes technology to expand access to early intervention and counseling programs to seniors in need during the COVID crisis and beyond. In addressing seniors' behavioral health needs, the program follows the guidance of the American Psychological Association (2020), which prioritizes the importance of utilizing technology to expand access; decreasing the stigma of seeking mental health support; increasing an understanding of depression and anxiety in seniors; and identifying seniors in need of prevention. The program's mission is to provide easily accessible evidence-based counseling services designed for older adults. Our vision is to improve wellness for Valley's seniors through innovative programming. The target population is adults age 60 and above, including veterans, who are living at or below 250% of poverty level. The program emphasizes service provision to the Latinx population through collaborations with key senior organizations. In 2019, HARC estimated that there were approximately 130,000 Valley residents age 65 and older, representing over 30% of the total population; 28% were Latinx. In 2018, HARC reported that 22% of seniors had diagnosed mental health disorders.

The proposed program will strengthen and expand community access to behavioral health services led by our LCSW Program Director who supervises two AMFT counselors and one peer counselor serving homebound seniors utilizing the PEARLS program. The LCSW provides weekly supervision of counselors, reviews clients' progress, and oversees development of individualized treatment plans. The AMFT counselors utilize Problem Solving Therapy, a SAMHSA supported evidence-based cognitive behavioral intervention that improves an individual's ability to cope with stressful life experiences, and is an effective intervention for seniors for anxiety and depression. We will strengthen collaborative partnerships with organizations that service the Latinx community to provide accessible counseling at satellite locations utilizing our bi-lingual counselor. Grant funds will provide counseling for 52 counseling clients; 15% will be from the Latinx community; 60% of clients will demonstrate clinically-assessed or self-reported improvement in presenting problem; 40 clients will experience reduced food insecurity anxiety through receiving regular home delivered meals. Program evaluation will track quantitative and qualitative data, including the number of behavioral health outpatient treatment sessions, clinical assessments, treatment plan development, achievement of treatment goals, and client surveys tracking self-report of improvement in presenting problem and reduction in food insecurity anxiety.

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

The Joslyn Wellness Center, established in 2018, utilizes an innovative holistic approach based around four pillars of need: Mental Health, Healthy Aging, Exercise and Active Living. The program was nationally recognized by the National Council on Aging (NCOA)/National Institute of Senior Centers as a program of excellence in June, 2020. This request is focusing on the counseling aspects of the program.

The Coachella Valley is the epicenter of a rapidly growing senior population. The most recent Health Assessment and Research for Communities (HARC) report estimated that there are approximately 130,000 individuals age 65 and older in our Valley. This represents over 30% of the total population. In California generally, the 2019 estimate of those 65 and older was approximately 14%. In the mid-Valley, the 2019 Census estimate shows that over 45% of the total population is over age 65 with almost 17% over age 75. This is three times the California average for the same age groups. The HARC special COVID Report found that more individuals are experiencing increased stress, anxiety and isolation. In both the most recent HARC report and the Desert Healthcare District Needs Assessment, mental and behavioral health services were identified as a priority need for seniors.

**Strategic Plan Alignment:**

Behavioral Health/Mental Health / Increase the number of peer mental health educators

**Program/project description:**

This request supports the evidence/research-based and innovative Joslyn Wellness Center counseling program, increases community collaboration, and expands technology to bring early intervention and counseling programs to seniors in need during the COVID crisis and beyond. The importance of developing technology and decreasing the stigma of seeking mental health support, increasing an understanding of depression and anxiety in seniors, and identifying seniors in need of prevention is prioritized by the American Psychological Association (2020).

The Joslyn Wellness Center would strengthen and expand the counseling aspects of this program by supporting our licensed associate/intern program under the supervision of a licensed LCSW. The LCSW provides weekly supervision of the associate/intern counselors and reviews the progress of each client as well as developing and supervising the treatment plan in order to ensure high quality outcomes for the client. Additionally, the LCSW would supervise and support the peer counselor in the PEARLS program for homebound seniors providing additional safety net mental health support to this vulnerable population. To effectively address locally underserved communities our program utilizes a Spanish speaking counselor. Problem Solving Therapy, is a SAMHSA supported evidence-based cognitive behavioral intervention that improves an individual's ability to cope with stressful life experiences, and is an effective intervention for seniors for anxiety and depression. Utilizing our existing program infrastructure and through other funding sources we will strengthen our established collaboration with local senior service providers in order to bring this counseling model to the local community as well as underserved Spanish speaking clients utilizing our Spanish speaking AMFT.



Other programs under the auspices of the Wellness Center such as the UCLA Longevity Center Brain Boot Camp, the National Council on Aging, Aging Mastery Program, and PEARLS peer counseling for homebound seniors will continue to provide resources and referrals to the Problem Solving Strategies counseling program.

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

The priority population is seniors and older adults, including veterans, age 60 and above who are living at or below 250% of the poverty level. A special emphasis is to provide services to the Spanish speaking Latinix population.

**Geographic Area(s) Served:**

Cathedral City; Coachella; Indio; Indian Wells; La Quinta; Palm Desert; Rancho Mirage; Thousand Palms; Bermuda Dunes

**Age Group:**

(25-64) Adults  
(65+) Seniors

**Total Number of District Residents Served:**

92

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> By January 31, 2022, a total of 52 low-income older District residents age 60 and above, including 15% from the Coachella Valley’s Latinix community, will have received behavioral health assessments by the Joslyn Wellness Center’s mental health clinicians to identify behavioral health issues that result in development of a treatment/action plan with specified goals and timeline for goal achievement.</p>	<p><b>Evaluation #1:</b> Progress towards goal achievement will be tracked and monitored by the Program Director, a Licensed Clinical Social Worker (LCSW), in conjunction with two Associate Marriage and Family Therapist (AMFT) peer counselors and the Program Administrator, who tracks data via an Excel spreadsheet from clinician notes and assessments. Quantitative data includes age, ethnicity, language preference, and zip code. Qualitative data includes counseling sessions, clinical assessments and treatment plans provided. Grant funds will service 52 clients, 30% of the projected 175 program clients for grant period. To monitor outreach to the Latinix community, the Program Director will track and report to the Executive Director the ability to secure at least three satellite counseling locations that are in neighborhoods accessible to the Latinix community. Ongoing program monitoring will track progress towards providing projected assessments and</p>
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	<p>treatment plans, as well as enrolling clients from the Latinx community. A general client satisfaction survey is conducted annually or upon client's exit from program to elicit qualitative feedback on program and staff; and ask open-ended questions about overall agency performance. Results are reviewed, summarized, and presented to staff and Board. Information is used to develop an action plan addressing necessary changes to programs, services, and administrative operations.</p>
<p><b>Goal #2:</b> By January 31, 2022, a minimum of 31 low-income older District residents age 60 and above receiving behavioral health services through the program will demonstrate progress in resolving presenting issue through clinical assessment, self-report, and/or achievement of at least one treatment goal identified in behavioral health treatment plans developed in collaboration with the program's mental health clinicians.</p>	<p><b>Evaluation #2:</b> Evaluation of goal achievement will be tracked and monitored on an ongoing basis by the Program Director in conjunction with peer counselors and with support from the Program Administrator. Clients are eligible to participate in up to 12 counseling sessions at which point they are re-evaluated for resolution of presenting issues, and/or manifestation of additional presenting issues that may require subsequent treatment at Joslyn or referral to other community-based behavioral health treatment providers. Clinicians monitor client engagement in treatment as indicated by participation in a minimum of three sessions. Clinicians administer Depression Screening tool Patient Health Questionnaire (PHQ-9) assessments on a pre and post treatment basis. Staff administer client surveys in both English and Spanish to ascertain improvement in quality of life and overall program satisfaction. Program success is evaluated by a minimum of 60% (31) of clients self reporting improvement or resolution in presenting issues, improvement in clinical assessments as measured by pre and post PHQ-9 assessments, and/or achievement of a minimum of one goal identified in treatment plans. The Program Administrator tracks quantitative and qualitative data via an Excel spreadsheet from reports provided by clinicians. Program results are monitored on an ongoing basis by the Program Director.</p>

<p><b>Goal #3:</b> By January 31, 2022, a total of 40 low-income older District residents age 60 and above will report experiencing reduced anxiety about food insecurity and decreased depression because of socialization with caring Joslyn Center volunteers by receiving up to seven nutritious meals per week with each meal meeting up to a minimum of one-third of the Dietary Reference Intakes by the Food and Nutrition Board, Institute of Medicine, National Academy of Sciences.</p>	<p><b>Evaluation #3:</b> Evaluation of goal achievement will be tracked and monitored on an ongoing basis by the Executive Director in conjunction with the Program Director with support from the Program Administrator. The Program Administrator will track data via an Excel spreadsheet. Quantitative data includes number of unduplicated clients served, number of meals provided, age, ethnicity, language preference, and zip code. Qualitative data includes anxiety regarding food insecurity and depression as measured by client surveys. Wellness Center staff will follow-up with clients expressing anxiety, depression or other mental health issues for potential intake into the Problem Solving Strategies counseling program. Grant funds will service 40 clients, 32% of the projected 125 program clients for grant period. Clients are surveyed at periodic intervals to ascertain reduction in food insecurity anxiety. Surveys are conducted in English and Spanish. A general client satisfaction survey is conducted annually or upon client's exit from program to elicit direct feedback on program and staff; and ask open-ended questions about overall agency performance. Results are reviewed, summarized, and presented to staff and the Board. The information is used to develop an action plan addressing necessary changes to programs, services, and overall administrative operation.</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

Success is measured by achieving benchmarks, objectives and positive mental health outcomes. Counseling benchmarks include number of unduplicated clients participating in behavioral health treatment; attendance at a minimum of three counseling sessions; meeting of treatment goals; and improvement in presenting problem demonstrated through clinical assessments and client self-reports. Last year, 94 clients participated in our counseling program; 100% received clinical assessments and treatment plans. Of these, 80% completed treatment with 67% achieving treatment goals. The Program Administrator tracks demographics and outcome data via an Excel spreadsheet from

data collected by clinicians. Quantitative data includes gender, age, zip code, income, ethnicity, and other data. Qualitative data tracked includes the number of behavioral health outpatient treatment sessions, clinical assessments, treatment plan development, and achievement of treatment goals. Progress notes are maintained in confidential client files. Improvements in clinical assessments and achievement of treatment goals are reported at minimum of six-month intervals. All data is kept in secure, HIPAA-compliant electronic and printed client files that are maintained in locked cabinets with restricted access to authorized personnel only. We utilize evaluation processes that are consistent with the International Classification of Diseases and Related Health Problems (ICD 10), including the Patient Health Questionnaire (PHQ-9), which are collected at intake and at periodic treatment intervals. Client self-reporting of Quality of Life, reduction in food insecurity anxiety, and improvement in symptoms are measured by surveys administered by with results tracked via Excel spreadsheets and reported quarterly. Program results are analyzed by staff under the direction of the Program Director, a Licensed Clinical Social Worker, and reported monthly to the Executive Director and at regular intervals to the Board of Directors. We are investigating affordable options for HIPAA compliant, cloud-based Electronic Health Records databases to monitor and report client data, clinician notes, and program objectives and outcomes.

### **Organizational Capacity and Sustainability**

#### **Organizational Capacity**

Since 1981, the Joslyn Center has provided a multitude of educational programs, recreational activities, and vital services including food delivery to thousands of older Valley adults. In 2018, we launched the Joslyn Wellness Center to address local seniors emerging needs as they live longer than their predecessors and many are unprepared for physical, emotional and financial challenges they confront. The Wellness Center's Senior Behavioral Health Services program provides broad based, inter-related components that create a holistic approach to mental health wellness in the Valley's aging population. Staff include an LCSW Program Director, with specialized supervision training, who oversees two AMFT. The Program Director meets weekly with AMFT to review case files and assess clients' progress in achieving treatment goals. One peer counselor for homebound seniors utilizes the CDC-approved evidence-based intervention, Program to Encourage Active, Rewarding Lives (PEARLS). Other program staff includes a program intake/data entry position and a Program Manager to ensure program goals are achieved and provide outreach to facilitate and strengthen collaboration with community partners. Since the COVID-19 pandemic's onset, we have provided virtual counseling via the encrypted, HIPAA-compliant Zoom platform. Last year, 94 clients participated in our counseling program; 80% completed treatment with 67% achieving treatment goals.

#### **Organizational Sustainability:**

The Joslyn Wellness Center's establishment was a key component of our 2017 Strategic Plan. The stated goal was: To Continue Growing Wellness Center and Evaluate Programs and Services. Objectives included to refine programs and services that are suited to community collaboration; assess additional programs and services related to the Wellness Center and monitor effectiveness; and establish a stable funding base. Each month, our Board monitors progress towards strategic goals, including client

statistics and outcomes, and development of community collaborations. The Wellness Center's continued development is among the Board's highest priorities. The program has varied funding sources that provide a strong basis of financial support and reduce vulnerability to reductions from any one funding sources, including grants, fundraising, membership, and contributions from the cities of Rancho Mirage, Indian Wells and Palm Desert. Since inception, significant funding support has been received from the Desert Healthcare District, major gifts; and the Auen, Spearman, Kaiser, and Coachella Valley Wellness Foundations. Our next planning process in 2021 will include focus on behavioral health services. We are investigating application processes for reimbursable behavioral health services from government and private insurance programs, including the Veterans Administration, which will increase program sustainability and enable continued expansion.

### **Partnerships:**

#### **Key Partners:**

Establishing and building on collaborative partnerships with various organizations is a vital component of our overall strategic plan relating to the Wellness Center's programming. The Joslyn Wellness Center has been developing and strengthening key collaborative partnerships with numerous Valley-based organizations. Our collaborations with both the Cathedral City and Indio Senior Centers have been vital in expanding the Wellness Center's outreach to the Latinx community. We are working with both senior centers to provide on-site programming, education and counseling. Both senior centers joined with Joslyn to co-sponsor Eisenhower Health lectures to our respective members. Our Spanish speaking counselor has met with the coordinator of Indio Senior Center and informational flyers have been distributed to Indio members about the programs. This has resulted in the recruitment of Latinx clients to our counseling program. Other key partners and collaborators include The Braille Institute, Alzheimer's Coachella Valley, and Coachella Valley Alzheimer's Association. Presentations, classes, and counseling have been provided to their respective members through the Problem Solving Strategies counseling program. Problem Solving Therapy is found to be especially effective for older adults in coping with the onset of macular degeneration. We have also established a new collaborative partnership with Mizell Center to provide Wellness Center counseling and programming. We collaborate closely with medical and behavioral health providers at Desert Oasis Healthcare, Eisenhower Health and Desert Regional Medical Center, among others. A key part of our program includes hiring a program manager/outreach coordinator to affirm these collaborations and coordinate program outreach on a consistent basis. Included with this application are letters of commitment from Indio Senior Center, the Cathedral City Senior Center and Mizell Senior Center that outline our respective support and collaborative activities that will be undertaken to expand the program to reach more seniors and older adults.

## Line Item Budget Operational Costs

PROGRAM OPERATIONS		Total Program/Project Budget	Funds from Other Sources <b>Detail on sheet 3</b>	Amount Requested from DHCD
<b>Total Staffing Costs</b> <b>Detail on sheet 2</b>		\$158,750.00		\$51,750.00
<b>Equipment (itemize)</b>				
1				0
2				0
3				0
4				0
<b>Supplies (itemize)</b>				
1	Program Licensing Fees	\$3,000.00		\$0.00
2	Training Manuals/Aging Mastery BBC	\$2,000.00		\$0.00
3	Marketing Brochures/Flyers	\$1,000.00		\$0.00
4	Meeting Supplies/Participant Snacks	\$500.00		\$0.00
5	Office Supplies	\$1,000.00		\$0.00
<b>Printing/Duplication</b>		\$500.00		\$0.00
<b>Mailing/Postage</b>				\$0.00
<b>Travel/Mileage</b>		\$500.00		\$0.00
<b>Education/Training</b>		\$4,000.00		\$3,000.00
<b>Office/Rent/Mortgage - Allocation</b>		\$2,000.00		\$0.00
<b>Telephone/Fax/Internet</b>		\$1,500.00		\$0.00
<b>Utilities</b>				\$0.00
<b>Insurance</b>				\$0.00
<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	Meals on Wheels Food Costs	\$50,000.00		\$50,000.00
2	Marketing and Advertising	\$6,000.00		\$0.00
3	Encrypted Zoom and e-mail	\$2,500.00		\$0.00
4	Indirect at 8%	\$14,380.00		\$4,380.00
<b>Total Program Budget</b>		<b>\$247,630.00</b>	<b>\$138,500.00</b>	<b>\$109,130.00</b>
<b>Budget Narrative</b>	<p><b>Program Licensing Fees:</b> The licensing fees for evidence based programs <b>Training Educational Materials/Aging:</b> Training Materials for counseling programs programs and <b>Office supplies:</b> printer cartridges, paper, pens, writing tablets, etc. <b>Marketing Brochures:</b> Purchase of brochures for evidence based programs as well as designing and printing of class brochures and flyers <b>Meeting Supplies and Participant Snacks:</b> Flip charts, pens, paper pads, and snacks for participants in Evidence based programs <b>Printing/Duplication:</b> printing and duplication of course materials, flyers, etc. <b>Education/Training</b> Training costs for evidence based courses, Mental Health First Aid, and staff training for HIPAA compliance <b>Office Rent:</b> Allocation of dedicated space for counseling rooms, and program office <b>Telephone/FAX/Internet:</b> Costs of telephones for office space, internet access for email <b>Meals on Wheels Food Costs:</b> Costs of food preparation and packaging to provide meals to approximately 25% of unduplicated Meals on Wheels clients. <b>Marketing and Advertising:</b> Print and internet advertising in publications with a large senior and older adult readership <b>Encrypted Zoom and email</b> Utilized to insure confidentiality per HIPAA <b>Indirect Costs:</b> Administration, accounting for reporting compliance, audit, security, utilities, insurance, and other overhead costs for the counseling program.</p>			

## Line Item Budget Staffing Costs

Staff Salaries		Annual Salary	% of Time Allocated to Program	Actual Program Salary	Amount of Salary Paid by DHCD Grant
<b>Employee Position/Title</b>					
1	LCSW Wellness Center Supervisor	\$124,800.00	0.40	\$46,800.00	\$30,000.00
2	Program Manager	\$60,000.00	0.40	\$24,000.00	\$0.00
3	Program Intake/Data Entry	\$35,000.00	0.75	\$26,250.00	\$0.00
4	Behavioral Health Prog. Interns (2)	\$62,000.00	0.50	\$31,000.00	\$15,000.00
5	Program Peer Educators (1)	\$40,000.00	0.25	\$10,000.00	\$0.00
6					
7					
8					
<b>Total Employee Taxes/Benefits@ 15%</b>				\$20,700.00	\$6,750.00
<b>Enter this amount in Section 1;Staffing Costs</b>				<b>Total ›</b>	<b>\$51,750.00</b>
<b>Budget Narrative</b>	<b>LCSW Wellness Center Supervisor:</b> Salary of Wellness Center Supervisor LCSW licensed to allow for counseling and supervision of interns and peer counselors (.40 FTE) <b>Program Manager:</b> Tracks program results and develops strategies for marketing and outreach. Supervises Program Intake/Data entry. <b>Program Intake/Data Entry:</b> Serves as program intake for all programs, data entry for reports, office coordinator. <b>Behavioral Health Interns (2)</b> Based on 18 hours per intern per week. Deliver Problem Solving Therapy at low/no cost. <b>Peer Educators:</b> Trained to deliver PEARLS evidence based program based on Problem Solving Therapy.				
<b>Budget Narrative</b>	Employee benefits are calculated for state, federal and other taxes as well as Workers' Compensation Insurance and medical insurance if applicable to the position. Under newly enacted California laws, we cannot enter into Independent Contractor Agreements with the Wellness Center Director, Behavioral Health Interns or Program Peer Educators.				
<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 ›</b>	<b>\$0.00</b>
<b>Budget Narrative</b>					

## Line Item Budget Other Program Funds

Other funding received (actual or projected) SPECIFIC to this program/project			Amount
<b>Fees</b>			\$5,000.00
<b>Donations</b>			
<b>Grants (List Organizations)</b>			
1	Kaiser Foundation	\$10,000.00	
2	Grace Helen Spearman Foundation	\$25,000.00	
3	Auen Foundation	\$17,500.00	
4	Regional Access Project Foundation	\$10,000.00	
5	City of Palm Desert CDBG	\$55,000.00	
<b>Fundraising (describe nature of fundraiser)</b>			
1	Allocation from Fundraising Events	\$16,000.00	
2			
<b>Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)</b>			
1			
2			
3			
4			
<b>Total funding in addition to DHCD request</b>			<b>\$138,500.00</b>
<b>Budget Narrative</b>	<p style="color: red;">The fees are projected from experience with the programs. The grants from Kaiser Foundation, Grace Helen Spearman Foundation, Auen Foundation and Regional Access Project Foundation are allocated grants to the potential funded program period. Pending/renewal requests for continued funding will be submitted to these same foundations. The Palm Desert CDBG is for the FY 2020-21 and is allocated to the potential funded program period. It should be noted that actual grants from Kaiser, Grace Helen Spearman Foundation, Regional Access Project and Auen Foundation are in excess of the amount indicated, but are allocated to cover expenses incurred when funding from the Desert Healthcare District is expired or in process. This allows The Joslyn Wellness Center operations and programs to continue uninterrupted and provide for a sustainable program.</p>		





December 17, 2020

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**CONTACT**

37-171 W. Buddy Rogers Ave.  
Cathedral City, CA 92234  
760.321.1548  
www.theccsc.org  
Tax ID 95-3618489  
Platinum GuideStar Rating

Desert Healthcare District  
1140 N. Indian Canyon Drive  
Palm Springs, CA 92262

Dear Desert Healthcare District Board Members,

I write this letter in full support of the Joslyn Center Wellness Center's grant application, staff members, volunteers, programs, and services.

The Joslyn Center has been exceptionally generous in working with the Cathedral City Senior Center (CCSC), especially in presenting programs and supporting our members through Joslyn Wellness Center programming. Our members benefit from these programs, which CCSC would otherwise not be able to provide them. Many CCSC members cannot travel to other senior centers, so having this vital wellness programming on-site is beneficial. An informal survey of our regular participants revealed that 76% of them are easily considered "low-income." Therefore, accessing multiple community services all in one place is crucial.

The Joslyn Center/Joslyn Wellness Center will collaborate with the Cathedral City Senior Center by:

1. Providing information and outreach about Problem Solving Strategies and other Wellness Center programming to the Cathedral City Senior Center;
2. Provide qualified program instructors, LCSW, Associate LCSW, or Associate MFT for counseling or program service, including Spanish speaking counselors as necessary;
3. Coordinate appointments for Problem Solving Strategies with the Cathedral City Senior Center through the Joslyn Wellness Center to maintain confidentiality;
4. Arrange for space and mutually agreed upon lecture dates to provide counseling and educational opportunities to the Cathedral City Senior Center members.



The Cathedral City Senior Center will collaborate with The Joslyn Wellness Center by:

1. Establishing agreed-upon dates and times for Problem Solving Strategies outreach and information to Cathedral City Senior Center clients and support group participants;
2. Providing space for marketing material and flyers for Joslyn Wellness Center programs;
3. Coordinating appointments for Problem Solving Strategies with the Joslyn Wellness Center to maintain confidentiality;
4. Providing appropriately sized rooms and set-up required for each class or counseling session if desired to occur at the Cathedral City Senior Center offices.

It is the intention of the parties hereto that the Joslyn Wellness Center and the Cathedral City Senior Center will work collaboratively to provide mutually beneficial programs and services to their clients through outreach, distribution of flyers and marketing materials, as well as presentations and providing space for programs on a mutually agreed upon date and time.

Additionally, we share a priority commitment to increase program and service outreach that is culturally appropriate to the Latinx community. Working with Joslyn Center Wellness Center will enhance a unique board-designated high-priority project to expand outreach and increase Cathedral City's majority Latinx community involvement. A recent grant award assists in establishing CCSC@Home Español, and we have robust plans to increase participation at CCSC. We are honored to work with Joslyn Center and support them in their bid to continue this important work with seniors, especially as we endure and eventually heal from a pandemic that has affected them.

Thank you for your consideration.

Sincerely,



Geoff Corbin  
Executive Director  
Cathedral City Senior Center  
404.759.8443



December 16, 2020

Desert Healthcare District  
1140 N. Indian Canyon Drive  
Palm Springs, CA 92262

Dear DHCD Board Members,

This letter is written in support of the grant application of The Joslyn Wellness Center, their staff members, volunteers, programs and services.

The Joslyn Center and the Mizell Center have previously collaborated in providing the A Matter of Balance senior fall prevention program and in presenting programs and support to our respective members and clients in order to provide essential services to local area seniors and older adults.

Mizell Senior Center will collaborate with The Joslyn Wellness Center in providing information and referrals to their Problem Solving Strategies senior counseling program and will provide in-person counseling space upon a mutually agreed upon schedule. This collaboration will include the Joslyn Wellness Center providing licensed intern therapists under the supervision of a Licensed Clinical Social worker to members and clients of Mizell Senior Center. Our respective organizations serve a vital need in the Coachella Valley, particularly at this challenging time, as the demographic we serve is particularly vulnerable to the isolation resulting from COVID-19, and to the virus itself. The support and educational services provided by the Joslyn Wellness Center counseling program are a significant component in the Coachella Valley safety net as they are providing essential services to this fragile population. It is my pleasure to provide an endorsement of their programs and services, and their community partnerships.

Sincerely,

Wes Winter  
Executive Director

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Wes Winter  
*Executive Director*

**Jack Newby**

---

**To:** Argelia Jimenez  
**Subject:** RE: The Joslyn Wellness Center - Desert Healthcare District Grant Application

---

**From:** Argelia Jimenez <Ajimenez@indio.org>  
**Sent:** Friday, December 18, 2020 4:25 PM  
**To:** Jack Newby <JackN@joslyncenter.org>  
**Subject:** RE: The Joslyn Wellness Center - Desert Healthcare District Grant Application

**Hi Jack,**

**Attached the letter of support from the ISC. Let me know if you need anything else, I am more than happy to help in any way possible.**

**Have a wonderful Holidays and a happy New Years!**

**Best,**

*Argelia Jimenez*

Community Program Administrator  
Indio Senior Center  
45-700 Aladdin St.  
Indio, CA 92201  
760-391-4170  
M-F 7:30am-4:30pm  
[www.indio.org/seniorcenter](http://www.indio.org/seniorcenter)

December 17, 2020

Desert Healthcare District  
1140 N. Indian Canyon Drive  
Palm Springs, CA 92262

Dear DHCD Board Members,

This letter is written in support of the grant application of The Joslyn Wellness Center, their staff members, volunteers, programs and services.

The Joslyn Center and the Indio Senior Center have been collaborating in providing educational seminars provided by Eisenhower Health. Additionally, Indio Senior Center has distributed information to our members about The Joslyn Wellness Center Problem Solving Strategies counseling program.

Indio Senior Center will collaborate with The Joslyn Wellness Center in providing information and referrals to their Problem Solving Strategies senior counseling program and will provide in-person counseling space upon a mutually agreed schedule. This collaboration will include the Joslyn Wellness Center providing licensed intern counselors under the supervision of a Licensed Clinical Social worker to members and clients of Indio Senior Center. The Joslyn Wellness Center will provide a Spanish speaking counselor to our clients as needed. Our respective organizations serve a vital need in the Coachella Valley, particularly at this challenging time, as the demographic we serve is particularly vulnerable to the isolation resulting from COVID-19, and to the virus itself. The support and educational services provided by the Joslyn Wellness Center counseling program are a significant component in the Coachella Valley safety net as they are providing essential services to this fragile population. It is my pleasure to provide an endorsement of their programs and services, and their community partnerships.

Sincerely,

  
Argelia Jimenez  
Community Program Administrator

## Grant Scoring Review

### Grant Staff Review # 1 of 3

---

**Executive Summary:** 10

**Community Need and Alignment:** 8

**Goals:** 9

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 10

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**Total Score:** 73.00

---

**Reviewer Comments:** The Joslyn Center is requesting support to continue to address two heightened challenges faced by a vulnerable population: mental health support and food security. Both of these focuses directly align with the strategic priorities of the Desert Healthcare District. Our funds will support Joslyn's Wellness Center's mental health clinicians in providing behavioral health assessments, treatment plans, and continued follow-up counseling care to low-income District seniors. Additionally, our funds will target food insecurity, through the meals on wheels program, by providing 40 residents up to seven meals weekly for the duration of the grant with wellness checks during meal drop off. The Joslyn Center continues to look for opportunities to expand their reach, increase partnerships, and strengthen sustainability efforts and I fully support funding this proposal.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 19 (2 of 2)

Grant Program Staff Review Stage: 72 (3 of 3)

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

Fiscal Staff Review Stage: 38 (2 of 2)

Grant Program Staff Review Stage: 216 (3 of 3)

**Total average proposal score: 91/100**

## **Grant Scoring Review**

### **Grant Staff Review # 2 of 3**

---

**Executive Summary:** 9

**Community Need and Alignment:** 9

**Goals:** 9

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 8

**Budget:** 9

**Key Partners/Collaborations:** 9

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**Total Score:** 71.00

---

**Reviewer Comments:** Mental health counseling and provisions of meals are services that Joslyn Center provides is, now more than ever during the pandemic, crucial. This program strengthens and expands community access to behavioral health services led by Joslyn's LCSW Program Director and supervises 2 interns and one peer counselor serving homebound seniors. Clients requiring the services of Meals on Wheels has increased exponentially and funding by the District is imperative to ensure the homebound clients receive continuous and healthy food.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 19 (2 of 2)

Grant Program Staff Review Stage: 72 (3 of 3)

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

Fiscal Staff Review Stage: 38 (2 of 2)

Grant Program Staff Review Stage: 216 (3 of 3)

**Total average proposal score: 91/100**

## **Grant Scoring Review**

### **Grant Staff Review # 3 of 3**

---

**Executive Summary:** 10

**Community Need and Alignment:** 9

**Goals:** 9

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 8

**Budget:** 9

**Key Partners/Collaborations:** 9

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**Total Score:** 72.00

---

**Reviewer Comments:** The COVID-19 epidemic has increased the need for two crucial services provided the Joslyn Center, which are mental health and food insecurity. District funds will assist the Joslyn Center increase their capacity in their delivery of mental health services provided by their mental health clinicians, and enroll 40 seniors into their meals on wheels program. I support fully funding the proposed grant application.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 19 (2 of 2)

Grant Program Staff Review Stage: 72 (3 of 3)

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

Fiscal Staff Review Stage: 38 (2 of 2)

Grant Program Staff Review Stage: 216 (3 of 3)

**Total average proposal score: 91/100**



## **Grant Scoring Review**

### **Fiscal Staff Review # 1 of 2**

---

**Fiduciary Compliance:** 10

**Financial Stability:** 9

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**Total Score:** 19.00

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**Reviewer Comments:** Grantee possesses strong financial statements with annual audit report approved by the Board

Quick Ratio 8:1 demonstrates ability to cover current liabilities

Grant request represents 44% of the total budget with varied sources of additional funding.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 19 (2 of 2)

Grant Program Staff Review Stage: 72 (3 of 3)

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

Fiscal Staff Review Stage: 38 (2 of 2)

Grant Program Staff Review Stage: 216 (3 of 3)

**Total average proposal score: 91/100**

## **Grant Scoring Review**

### **Fiscal Staff Review # 2 of 2**

---

**Fiduciary Compliance:** 9

**Financial Stability:** 10

---

**Total Score:** 19.00

---

**Reviewer Comments:** Unmodified audit approved in a timely fashion, positive cash flow for 2020, sufficient assets to address liabilities and Board reviews financial statements regularly. Strategic plan in place to improve growth and grant amount is reasonable compared to overall organizational budget.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 19 (2 of 2)

Grant Program Staff Review Stage: 72 (3 of 3)

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

Fiscal Staff Review Stage: 38 (2 of 2)

Grant Program Staff Review Stage: 216 (3 of 3)

**Total average proposal score: 91/100**



## FY 2020-2021: Grant Application Scoring Rubric



Category	Meets expectations (10-6 points)	Does not meet expectations (0-5 points)
<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.).</p> <p>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.).</p> <p>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>

<b>Budget</b> (10 points)	<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>
<b>Key Partners / Collaboration</b> (10 points)	<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>
<b>Fiscal Review</b>		
<b>Fiduciary Compliance</b> (10 Points)	<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>

<b>Financial Stability</b> (10 Points)	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.	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.
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Total Score: \_\_\_\_/ 100

Recommendation:

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