



**DESERT HEALTHCARE DISTRICT  
PROGRAM COMMITTEE  
Program Committee Meeting  
March 09, 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/88581223164?pwd=VVVGbkQ3Y1NZUG90RkFySFQ3eVVwQT09>

**Password: 002888**

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: 885 8122 3164**

<i>Page(s)</i>	<b>AGENDA</b>	<i>Item Type</i>
	<b>I. Call to Order</b> – Director Evett PerezGil, Committee Chairperson	
1-2	<b>II. Approval of Agenda</b>	<b>Action</b>
3-6	<b>III. Meeting Minutes</b> 1. February 09, 2021	<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	
7-9 10	<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. Coachella Valley Health Information Place a. COVID-19 Testing and Vaccinations 2. DHCD – RAP Collective COVID-19 Recovery Fund	Information Information



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**VII. Grant Funding Requests**

- |              |   |               |
|--------------|---|---------------|
| <b>11-32</b> | 1. Consideration to recommend approve of:<br>a. Grant #1141 Martha's Village & Kitchen –<br><i>Homeless Housing with Wrap Around Services</i> - \$210,905 | <b>Action</b> |
| <b>33-54</b> | b. Grant #1171 Blood Bank of San Bernardino & Riverside Counties, aka LifeStream Blood Bank – <i>Bloodmobiles for Coachella Valley</i> – \$150,000        | <b>Action</b> |
| <b>55-77</b> | c. Grant #1174 Mizell Center – <i>Geriatric Case Management Program</i> – \$100,000   | <b>Action</b> |

**VIII. Committee Member Comments** Information

**IX. Adjournment**

Next Scheduled Meeting April 13, 2021



**DESERT HEALTHCARE DISTRICT  
PROGRAM COMMITTEE MEETING  
MEETING MINUTES  
February 09, 2021**

Directors Present via Video Conference	District Staff Present via Video Conference	Absent
Chair Evett PerezGil Vice-President Karen Borja Director Carmina Zavala	Conrado E. Bárzaga, MD, Chief Executive Officer Chris Christensen, Chief Administration Officer Donna Craig, Chief Program Officer Alejandro Espinoza, Program Officer and Director of Outreach Meghan Kane, Programs and Research Analyst Erica Huskey, Administrative and Programs Assistant Andrea S. Hayles, Clerk of the Board	

AGENDA ITEMS	DISCUSSION	ACTION
<b>I. Call to Order</b>	The meeting was called to order at 12:03 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 Zavala to approve the agenda. Motion passed unanimously.</b>
<b>III. Meeting Minutes</b> 1. January 12, 2021	Chair PerezGil asked for a motion to approve the January 12, 2021 meeting minutes.	<b>Moved and seconded by Vice-President Borja and Director PerezGil to approve the January 12, 2021 meeting minutes. Motion passed unanimously.</b>
<b>IV. Public Comment</b>	There were no public comments.	
<b>V. New Business</b>  1. <b>COVID-19 Recovery Grant in Collaboration with Regional Access Project Foundation (RAPF): Consideration to forward to the Board the recommendation to contribute a match of \$100,000 to a joint pool for nonprofits in the CV and Blythe (for RAP's benefit only) negatively impacted by COVID-19 to apply for funding.</b>	Donna Craig, Chief Program Officer, described the Board's prior approval of \$100k for collaborative action with the Regional Access Project Foundation (RAP) in March 2020 for emergency funding to organization's clients impacted by COVID-19. The Board discussed at the January meeting ways to present additional funding in another collaborative effort. RAP's board already approved another \$100K and would like to collaborate once	<b>Moved and seconded by Director Zavala and Vice-President Borja to forward to the Board the recommendation to contribute a match of \$100,000 to a joint pool for nonprofits in the Coachella Valley and Blythe negatively impacted by COVID-19 to apply for funding. Motion passed unanimously.</b>

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	<p>again with the District. District staff met with the RAP staff, determined the possibility of a COVID Recovery Fund to assist organizations with capacity support, discussed two options for vetting by RAP and the District, and discussed and reviewed with the Program Committee.</p> <p>Staff proposes expediting the process to review the applications for funding to RAP (option 2), and the District staff would make the recommendations for approval, which would save approximately 3 weeks of timing for distribution of funding, that the Program Committee approved.</p>	
<p><b>VI. Old Business</b></p> <p><b>1. Funding Requests Schedule</b></p> <p><b>2. Grant Payment Schedule</b></p>	<p>Chair PerezGil inquired on any questions of the committee concerning the funding requests and grant payment schedule.</p> <p>Director Zavala inquired on the Coachella Valley Parks and Recreation pending application and the grant guidelines, further questioning where the grant guidelines are located. Donna Craig, Chief Program Officer, described the details of the guidelines, which are located on the website, also explaining that the District is not funding capital projects at this time.</p> <p>Dr. Bárzaga, CEO, described the activities of the Coachella Valley</p>	

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	<p>Parks and Recreation and the need for a swimming pool, explaining that a large number of funds are remaining to support the Eastern Coachella Valley organizations.</p> <p>Vice-President Borja inquired on the LOI for Lift to Rise and the \$2.5M to the Housing Catalyst Fund and the process now that the LOI is received. Staff will evaluate the LOI and if the review process is effortless, a proposal will be presented to the Program Committee.</p> <p>Vice-President Borja requested legal counsels' presence at the next committee meeting since he has been a part of the process and is available to answer any questions on both ends. Dr. Bárzaga, CEO, explained that legal counsel was involved in the recoverable grant and program-related investments (POI) questions, but at the request of the committee, staff will invite legal counsel to the next meeting.</p>	
<p><b>VI. Program Staff Updates</b></p> <p><b>1. Community Health Needs Assessment and Health Improvement Plan</b></p>	<p>Meghan Kane, Programs and Research Analyst, explained that Health Assessment and Research for Communities (HARC) completed the prioritization based on the focus areas with the focus groups, all data is compiled following a tool kit for the District's specific needs with a well-rounded scoring of five</p>	

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	<p>priorities, and sharing with the Strategic Planning Committee. The detailed needs assessment abbreviated report with the major themes and findings are in progress, and HARC continues to develop an infographic for presenting to the Board.</p>	
<p><b>VII. Grant Funding Requests</b></p> <p><b>1. Consideration to approve Grant #1170 Jewish Family Service of the Desert: Mental Health Counseling Services for Underserved Coachella Valley Residents - \$80,000</b></p>	<p>Donna Craig, Chief Program Officer, explained the request for mental health counseling from Jewish Family Service of the Desert as a continuation of last year's grant award for personnel of five licensed marriage and family therapists and three licensed clinical social workers.</p> <p>Dr. Bárzaga, CEO, clarified that the allocation is for Behavioral Health/Mental Health in the current District funding strategic focus area.</p> <p>Kraig Johnson, Executive Director, Jewish Family Service of the Desert was available to answer any questions of the committee.</p>	<p><b>Moved and seconded by Director Zavala and Vice-President Borja to approve Grant #1170 – Jewish Family Service of the Desert: Mental Health Counseling Services for Underserved Coachella Valley Residents - \$80,000 and forward to the Board for approval. Motion passed unanimously.</b></p>
<p><b>VII. Committee Members Comments</b></p>	<p>There were no committee member comments.</p>	
<p><b>V. Adjournment</b></p>	<p>Chair PerezGil adjourned the meeting at 12:40 p.m.</p>	<p><b>Audio recording available on the website at <a href="http://dhcd.org/Agendas-and-Documents">http://dhcd.org/Agendas-and-Documents</a></b></p>

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

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

**FUNDING REQUESTS UPDATE for March 2021**

**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>DAP Health</b>	LOI received requesting \$750,000 over 3 years for a 3-Phased project to expand access to behavioral healthcare and primary healthcare.	Staff had a proposal conference with DAP Health and through Stage 2, the application, will recommending to fund Phase 1 – increasing the number of clinicians in behavioral health. Behavioral Health clinic will be opening in May; grant is expected to begin June 1.	District	Behavioral Health
<b>Lift to Rise</b>	LOI received requesting \$2.5 million to support the Coachella Valley Housing Catalyst Fund	Stage 2 has been generated and the application is expected to be brought forward to the April Program Committee	District? Facilities Replacement Fund?	Economic Protection, Recovery, and Food Security

<b>Coachella Valley Housing Coalition</b>	LOI received requesting \$107,750 to support the Oasis Villas Community Housing project in Thermal – healthcare navigator; feasibility study; and leasing outreach	Staff will be generating Stage 2, the application, for recommended support of the healthcare navigator position (approximately (\$41000)	District	Healthcare Infrastructure and Services
<b>Coachella Parks and Recreation Foundation City of Coachella</b>	LOI received requesting \$100,000 to rehabilitate the Bagdouma Park Swimming Pool in Coachella	A new LOI has been received for \$100,000 from the City of Coachella. Stage 2, the application, has been generated.	District	Healthcare Infrastructure and Services
<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 MARCH:</b> Application is on the March Program Committee agenda for consideration to approve \$210,095 request	District	Homelessness
<b>Blood Bank of San Bernardino</b>	LOI received requesting \$150,000 to support the	Application is on the March Program Committee agenda for	District	Healthcare Infrastructure and Services



<b>and Riverside Counties</b>	purchase towards the cost of one bloodmobile, which cost \$250,000 total	consideration to approve \$150,000		
<b>Mizell Senior Center</b>	LOI received requesting \$134,063 to support Geriatric Case Management Program	Application is on the March Program Committee agenda for consideration to approve \$100,000	District	Vital human services to people with chronic conditions

**DESERT HEALTHCARE DISTRICT  
OUTSTANDING GRANTS AND GRANT PAYMENT SCHEDULE**

As of 02/28/21

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	\$ 39,998	\$ -
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	\$ 270,933	\$ 40,136
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	\$ 18,000	\$ 22,000
2021-1136-BOD-01-26-21	1 Ronald McDonald House Charities - Temporary Housing & Family Support Services - 1 Yr		\$ 119,432	\$ 119,432	\$ 53,744	\$ 65,688
2021-1147-BOD-01-26-21	4 Alzheimer's Association - Critical Program Support - 1 Yr		\$ 33,264	\$ 33,264	\$ -	\$ 33,264
2021-1162-BOD-01-26-21	2 Joslyn Center - Wellness Center Program Support - 1 Yr		\$ 109,130	\$ 109,130	\$ 49,108	\$ 60,022
2021-1170-BOD-02-23-21	2 Jewish Family Services - Mental Health Counseling for Underserved Residents - 1 yr		\$ 80,000	\$ 80,000	\$ -	\$ 80,000
2021-BOD-02-23-21	5 COVID-19 Recovery Grants in Collaboration with Regional Access Project Foundation		\$ 100,000	\$ 100,000	\$ -	\$ 100,000
<b>TOTAL GRANTS</b>		<b>\$ 13,106,979</b>	<b>\$ 1,051,826</b>	<b>\$ 10,800,184</b>	<b>\$ 1,748,844</b>	<b>\$ 9,017,110</b>
<b>Amts available/remaining for Grant/Programs - FY 2020-21:</b>						
<b>Amount budgeted 2020-2021</b>			\$ 4,000,000		G/L Balance:	2/28/2021
<b>Amount granted through February 28, 2021:</b>			\$ (1,051,826)		2131	\$ 2,357,110
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>\$ 9,017,110</b>
Matching external grant contributions		\$ -				\$ (0)
<b>Balance available for Grants/Programs</b>			<b>\$ 2,967,403</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	\$ (680,672)	\$ 819,328		
2	Behavioral Health/Mental Health	\$ 500,000	\$ (189,130)	\$ 310,870		
3	Homelessness	\$ 500,000	\$ 469	\$ 500,469		
4	Vital Human Services to People with Chronic Conditions	\$ 1,000,000	\$ (33,264)	\$ 966,736		
5	Economic Protection, Recovery and Food Security	\$ 500,000	\$ (130,000)	\$ 370,000		
	<b>Balance available for Grants/Programs</b>	<b>\$ 4,000,000</b>	<b>\$ (1,032,597)</b>	<b>\$ 2,967,403</b>		



**Date:** 3/09/2021

**To:** Program Committee

**Subject:** Grant # 1141 Martha's Village and Kitchen

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**Grant Request:** Martha's Village: Homeless Housing With Wrap-Around Services

**Amount Requested:** \$210,905.00

**Project Period:** 4/1/2021 to 3/31/2022

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

Martha's Village and Kitchen is one of the largest homeless services providers in the Coachella Valley and is uniquely positioned to answer the increased need in assisting homeless with beds, housing, case management, and wrap-around services. Martha's has developed a housing and wrap-around service model with enhanced employment services, that provides a "person-centered pathway" into long-term housing solutions and independence. Martha's is expanding services to reach more homeless individuals and families across the Coachella Valley.

The District's funds will be utilized for the expansion of capacity at two new sites in the high poverty areas of Desert Hot Springs and Mecca as well as increasing the number of homeless beds by 10 at their Indio campus. Martha's expansion of homeless housing beds with wrap around services will increase the number of individuals that not only secure stable housing temporally but that are able to secure permanent housing long-term as evidenced Martha's placement rate of 80% to 90%. Martha's will increase the number of homeless individuals that are able to secure employment by following their proven strategy of offering support services on a customized basis, ensuring each individual is "employment ready", empowering them with the tools and resources to secure employment and increase their earnings potential. Approximately 75% of individuals that complete its employment services program will secure employment and/or increase their earning potential. Martha's new remote locations will allow for additional focus to be placed on high poverty and high unemployment populations becoming "employment ready".

**Strategic Plan Alignment:**

Homeless / Case management/wraparound services



**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Indian Wells; La Quinta; Palm Desert; Palm Springs; Rancho Mirage; Thousand Palms

**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 \$210,905.00 be approved.
- Recommendation with modifications
- Deny

## Full Grant Application Summary

### Martha's Village and Kitchen, Grant #1141

#### About the Organization

Martha's Village and Kitchen  
83791 Date Ave  
Indio, CA 92201  
Tel: (760) 347-4741  
Fax: (760) 347-9551  
<http://www.marthasvillage.org>

#### **Primary Contact:**

Matt Phillips  
Tel: (760) 347-4741  
Fax: (760) 347-9551  
[mphillips@marthasvillage.org](mailto:mphillips@marthasvillage.org)

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

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
2003		\$25,000	Grant	12/31/2003	
2017	Health in Housing: Emergency Housing With Wrap-Around Services	\$186,150	Achievement Building	11/28/2017	Grant budget
2018	Martha's Village: Homeless Housing With Wrap-Around Services	\$200,896	Grant	6/4/2019	
2019	Bridge Funding for MVK's Recuperative Care Program	\$40,100	Grant	7/23/2019	
2019	COVID-19 Safety Project	\$25,000	Grant	4/1/2020	

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

**Project Title:** Martha's Village: Homeless Housing with Wrap-Around Services

**Start Date:** 4/1/2021 **End Date:** 3/30/2022

**Term:** 12 months

**Total Project Budget:** \$427,625.00

**Requested Amount:** \$210,905.00

#### **Executive Summary:**

Martha's proposal is an expansion of homeless housing, case management, and wrap-around services to more effectively serve individuals throughout the DHCD's

boundaries. Central to this proposal, is the expansion of capacity at two new sites in the high poverty areas of Desert Hot Springs and Mecca as well as increasing the number of homeless beds by 10 and services provided on Martha's Indio campus. Martha's has secured office space that provides convenient access to homeless individuals in the community. Specifically, the Mecca site is in the same complex as the Clinicas de la Salud healthcare clinic and the First 5 office, as well as office space linked within the Food Now office space located in Desert Hot Springs.

Martha's goal is to follow its proven strategy of offering services on a customized basis, ensuring each individual is "employment ready", empowering them with the tools and resources to secure employment and increase their earnings potential. Critical to Martha's cost effective, project flow design is the expansion of capacity in its remote locations for wrap around services with enhanced employment services and English as education in Second Language. Martha's will evaluate progress toward these goals through its success in assisting homeless community members to overcome COVID-19's negative economic challenges on a path to permanent, housing with stable income.

The target population is homeless individuals within the DHCD's boundaries. All individuals served will be no or very low-income and fall below the Federal Poverty Level with many experiencing the negative economic consequences of COVID-19. The pandemic has created a new population of homelessness individuals that require Martha's services. Martha's new remote locations will allow for additional focus to be placed on high poverty and high unemployment populations becoming "employment ready". Additionally, Martha's will provide services in English and Spanish.

Martha's expansion of homeless housing beds with wrap around services will increase the number of individuals that not only secure stable housing temporarily but that are able to secure permanent housing long-term as evidenced Martha's placement rate of 80% to 90%. Martha's will increase the number of homeless individuals that are able to secure employment, evidenced by its track record of ensuring 75% of individuals that complete its employment services program will secure employment and/or increase their earning potential.

Martha's project will serve the rising need for homeless housing and services. Poverty and unemployment are obstacles to stable housing for many Coachella Valley cities. The percentage of individuals living in poverty in the targeted cities of Mecca (42.8%), Desert Hot Springs (36.8%) and Indio (18.1%) demonstrate communities that are lacking wrap-around services, specifically employment services and training that provide a concrete path out of poverty. COVID-19's negative economic impacts are highlighted by the Coachella Valley Economic Partnership reporting a 28.7% decrease in employment.

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

Martha's background serving as one of the largest homeless services providers in the Coachella Valley has uniquely positioned it to answer the increased need in assisting homeless with housing and wrap-around services. Over the past three decades, Martha's has developed the most cost-effective services and resources available. Unlike other housing models, Martha's program can effectively serve the entire DHCD

boundaries as well as tailor its assistance to the increased needs of the homeless from within the DHCD's boundaries with a focus on the underserved areas of Mecca, Desert Hot Springs, and Indio. Martha's has developed a housing and wrap-around service model with enhanced employment services, that provides a "person-centered pathway" into long-term housing solutions and independence.

**Strategic Plan Alignment:**

Homeless / Case management/wraparound services

**Program/project description:**

Martha's proposal is an expansion of homeless housing and wrap-around services to more effectively serve individuals throughout the DHCD's boundaries. Central to this proposal, is the expansion of capacity at two new sites in the high poverty areas of Desert Hot Springs and Mecca as well as increasing the number of homeless beds and wrap-around services with enhanced employment services provided on Martha's Indio campus. Martha's goal is to follow its proven strategy of offering services on a customized basis, ensuring each individual is "employment ready", empowering them with the tools and resources to secure employment and increase their earnings potential. Critical to Martha's cost effective, project flow design is the expansion of capacity in its three new remote locations for employment services and employment education. Martha's will evaluate progress toward these goals through its success in assisting homeless community members to overcome COVID-19's negative economic challenges on a path to permanent, housing with stable income.

The target population is homeless individuals within the DHCD's boundaries. All individuals served will be no or very low-income and fall below the Federal Poverty Level with many experiencing the negative economic consequences of COVID-19. The pandemic has created a new population of homelessness individuals that require Martha's employment services. Martha's new remote locations will allow for additional focus to be placed on high poverty and high unemployment populations becoming "employment ready". Additionally, Martha's will provide services in English and Spanish.

Martha's expansion of homeless housing beds will increase the number of individuals that not only secure stable housing temporarily but that are able to secure permanent housing long-term as evidenced Martha's placement rate of 80% to 90%. Martha's will increase the number of homeless individuals that are able to secure employment, evidenced by its track record of ensuring 75% of individuals that complete its employment services program will secure employment and/or increase their earning potential.

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

Martha's program will benefit homeless individuals and families within the DHCD's geographical boundaries including but not limited to veterans, those on Medicaid, those challenged by substance use, mental illness, and those fleeing domestic violence. Martha's proposed expansion will focus on three of the most underserved areas within the DHCD's boundaries (Mecca, Desert Hot Springs, Indio)

**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Indian Wells; La Quinta; Palm Desert; Palm Springs; Rancho Mirage; Thousand Palms

**Age Group:**

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

**Total Number of District Residents Served:**

190

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> Martha's will expand to provide 10 additional beds for homeless housing and wrap-around services at its main campus in Indio, during the term of the contract.</p>	<p><b>Evaluation #1:</b> These new beds will serve 40 additional DHCD homeless individuals with emergency housing, case management, and wrap-around services annually resulting 3,650 shelter service bed nights. Martha's Case Managers and Employment Specialists will ensure 100% data collection with data entry into the Client Tracking Database with client assessments and units of service.</p>
<p><b>Goal #2:</b> Martha's will expand by securing a new location in Mecca. Martha's to provide case management with wrap-around services to include the additional enhancements of Employment Services, English as a Second Language Instruction and Computer Skills Training to 75 homeless or at risk of homeless individuals in the underserved area of Mecca.</p>	<p><b>Evaluation #2:</b> Martha's Case Managers and Employment Specialists will ensure 100% data collection and data entry into our Client Tracking Database to include client assessments and units of service.</p>
<p><b>Goal #3:</b> Martha's will expand services in its Desert Hot Springs location. Martha's will expand services with case management with Wrap-Around Services, with its current Employment Services and Computer Skills</p>	<p><b>Evaluation #3:</b> Martha's Case Managers and Employment Specialists will ensure 100% data collection and data entry into our Client Tracking Database to include client assessments and units of service.</p>



<p>Training to 75 homeless or at risk of homelessness individuals in the underserved area of Desert Hot Springs.</p>	
<p><b>Goal #4:</b> Martha's will build collaborations with a combination of a minimum of ten (10) nonprofits, community organizations and local government, in both the areas of Mecca and Desert Hot Springs. This effort will begin with scheduled listening meetings with the entities mentioned above to ensure the needs of the communities are met in the area of homeless and at risk of homelessness services.</p>	<p><b>Evaluation #4:</b> Martha's Program Managers will track, report and monitor the progress of securing 10 new Community collaborations, while addressing discovered gaps in area services, such as food insecurity, employment, resources, housing, wellness, etc.</p>

**Proposed Program / Project Evaluation Plan**

The foundation of Martha's evaluation plan is the Logic Model, which describes the need for Martha's services based on research and statistics in alignment with the project goal of cost-effectively serving homeless individuals throughout the DHCD's boundaries. The Logic Model describes projected quantitative outcomes, indicators of success, sources of Martha's data, the methods used to gather data, as well as the evaluation procedures used to measure outcomes. Specifically, monitoring and evaluating Martha's homeless housing, case management and wrap-around service activities will involve collecting and analyzing statistical records, including clients' intake data, program participation, client records, and demographic profiles.

Significantly, for this project, the evaluation will include examination of the impact of Martha's services in the expanded areas of Mecca and Desert Hot Springs. Martha's Employment Specialists and Case Managers are responsible for ensuring data collection and data entry into the Database. This qualitative assessment will include the number of homeless individuals served, the wrap-around services provided, and results of the services provided. Martha's will customize its services based on the needs of the individual client and will track results accordingly. (i.e. move into permanent housing, certificate achieved, completed courses, employment achieved, healthcare received, employment documents secured). Martha's will also provide opportunities for residents and individuals that receive wrap-around services to provide feedback through oral feedback and written surveys.

Martha's will harness the strength of its data and surveys to analyze the project's success in meeting its goals and objectives. Martha's staff utilize this data and information to inform strategic planning, day-to-day decisions, and ensure that DHCD is able to see the positive impact on its residents. Additionally, Martha's leadership will collect feedback and data from staff and partners on the impact of the program.

## **Organizational Capacity and Sustainability**

### **Organizational Capacity**

For the past three decades, Martha's has developed a professional staff with significant experience meeting the essential needs of homeless individuals, by providing housing and wrap-around services, on a pathway to stable housing. Martha's has a full-time staff of 72 individuals and 2,213 passionate volunteers that provide a solid base of expertise and experience to expand bilingual services to the DHCD's homeless population. Martha's capacity includes an established history of assisting between 80%-90% of residents in exiting to permanent housing.

Martha's has developed a best practice, housing first, wrap-around services with enhanced employment services approach, to reduce barriers, increase opportunity, and meet essential needs of homeless individuals and families in the Coachella Valley. This project will include an expanded staff allocation of an Employment Specialist and Case Manager in Desert Hot Springs and Mecca. Additional hours of Shelter Staff, Case Manager, Employment Specialist will be provided in Indio to support the 10 additional beds.

Martha's successful, recent expansion of wrap-around services into Palm Springs demonstrates its ability to provide a high level of service in a remote office setting.

Further, Martha's is the only nonprofit in the Coachella Valley certified to provide employment services and training by the California Workforce Development Board.

### **Organizational Sustainability:**

Martha's proposed homeless housing, case management, and wrap-around services expansion project is at the core of its strategic plan, working to ensure individuals with the greatest needs have access to support and services. Martha's is fortunate to receive public and private support to help fund its comprehensive housing and wrap-around services. Also, Martha's has demonstrated its ability to be flexible while providing its housing and wrap-around services, uninterrupted, throughout the pandemic. This proposed project will allow Martha's to expand in an effective and sustainable manner that leverages other long-term revenue sources.

Martha's strategic plan continues to develop a wide-array of funding sources in support of its homeless housing and wrap-around services. Recently, Martha's utilized a Weingart Foundation grant to develop a strong, ongoing development infrastructure that includes updated fundraising technology and an updated approach to solicitations for donations, planned giving, public and private grants, retail/thrift store, events, corporate support, and auto auctions.

Martha's will also continue to partner with private funders as well as public entities including the cities of Indio, Palm Springs, Coachella, Palm Desert, Rancho Mirage, Indian Wells, La Quinta; County of Riverside, State of California, and the Federal Government to support the project's expansion into the future.

## **Diversity, Equity, and Inclusion**

**How is diversity, equity, and inclusion addressed?** Martha's has committed to diversity, equity, and inclusion on its board and executive staff through concentrated recruitment efforts focused on attracting a leadership team that reflects the community. The community's interests are then organically included in Martha's organizational policies, strategies, and operations. Martha's came into existence out of a grass roots initiative of concerned community members to assist their neighbors and today this same mission allows Martha's to proactively recruit leaders that embody diversity, equity, and inclusion. Martha's Board includes a former Martha's housing client that provides the organization's leadership a first-hand perspective of the challenges of overcoming homelessness. Martha's utilizes this valuable perspective to shape not just Martha's housing programs but for the organization. This Board Member is able to inform Martha's mission and vision in a way that ensures that the organization is working to make an impact in the most meaningful way for our specific community. Martha's also administers monthly resident House Meetings and satisfaction surveys. Martha's received a Weingart grant that funded Martha's executive leadership additional time to identify opportunities to recruit diverse board and executive staff both online and at job fairs. Consequently, Martha's recruited two new board members that added diversity, equity, and inclusion. Martha's also takes advantage of its membership with the Regional Access Project's CNA division and its consultants for training and strategic planning during these uncertain and changing times

**What is preventing the organization from addressing diversity, equity, and inclusion?** Not applicable

### **Partnerships:**

#### **Key Partners:**

Crucial to the proposed project is Martha's ability to mobilize diverse partnerships between nonprofit organizations, government, and regional businesses for a common goal of assisting neighbors in need. Martha's proposed expansion project unites the collaborative efforts of community partners in the Coachella Valley with a focus on housing, wrap around services, and health services with a focus on the most underserved areas within the DHCD's boundaries (Mecca, Desert Hot Springs, Indio). This collaborative approach allows partners to utilize their strengths in quickly identifying the most expedient path to housing and support services.

One of Martha's most innovative approaches to partnerships is working with city governments to provide a customized approach to meeting the wrap-around service needs with a focus on the employment service needs of a particular community. This strategy has been successful in providing employment and education services within Palm Springs. Recently, this approach assisted 500 homeless individuals annually with wrap around service and employment services while providing a new partnership for Martha's. This proposal will allow Martha's to expand into other Coachella Valley cities as it provides an opportunity to utilize this type of "City Partnership" as a model to serve additional individuals.

Martha's partnership with Workforce Development Board will assist in providing employment training that aligns with the identified regional labor market needs. Martha's partnership with the Workforce Development Board also provides Martha's staff with training to ensure they are providing up to date, tailored employment services.

Martha's will provide employment training opportunities for adults through its new partnership with Riverside County's Work Experience (WEX) Program which will provide homeless individuals with the opportunity to obtain paid, employment in the fields of administration, food services, program delivery, nursing assistant, etc. Martha's is in the process of certification to launch in October of 2021 an exciting additional employment training program through E-Snaps.

Martha's is also an active partner within Riverside County's CoC for sharing best practices and service collaborations.

**Line Item Budget - Sheet 1 Operational Costs**

*Approved budgets are the basis for reporting all grant expenditures. Line items may not be added or changed without grant amendment. Prior authorization is required for transferring funds (<10%) between existing line items. Describe budget narrative in cell B38. You may insert rows or create additional worksheets if more space is needed to fully describe your budget.*

<b>PROGRAM OPERATIONS</b>		<b>Total Program Budget</b>	<b>Funds from Other Sources Detail on sheet 3</b>	<b>Amount Requested from DHCD</b>
<b>Total Labor Costs</b>	<b>Detail on sheet 2</b>	312,893	143,188	169,705
<b>Equipment (itemize)</b>				
1	Computer Equipment and Software	1,000	1,000	
2	Miscellaneous Small Equipment	850	850	
3	Leased Equipment	480	480	
4	Misc Furniture (bed frames, mattresses, lamps)	1,200	1,200	
<b>Supplies (itemize)</b>				
1	Medical Supplies- Client PPE	2,000	1,000	1,000
2	Office Supplies DHS and Mecca offices	2,400	1,200	1,200
3	Operating Supplies - Desk shields - Mecca	1,700	1,400	300
4	Dining Room Supplies	700	700	
5	Cleaning Supplies	3,600	2,600	1,000
6	Hygiene Supplies	1,000	1,000	
7	Infant Supplies	600	600	
8	Food & service paper goods-Client meals	10,000	5,000	5,000
<b>Printing/Duplication</b>		200	200	
<b>Mailing/Postage/Delivery</b>		120	120	
<b>Travel</b>		600	600	
<b>Education/Training</b>		300	300	
<b>Facilities (Detail)</b>				
	Office/Rent/Mortgage - Office space Wrap Around and Employment Services- DHS office rent	14,000	6,000	8,000
	Meeting Room Rental	350	350	
	Telephone/Fax/Internet - Office phones and internet DHS and Mecca offices	3,200	2,200	1,000
	Utilities - Shelter Indio	5,000	4,000	1,000
	Insurance - DHS and Mecca offices	1,600	600	1,000
	Maintenance/Janitorial	2,400	2,400	
<b>Other Facility costs (itemize)</b>				
1	Pest Control, landscaping, trash ,contract services	600	600	
2	Licenses & Fees	100	100	
3	Vehicle Expenses	200	200	-
4	Contract service other	1,000	1,000	
5	Security Services - Mecca & DHS offices	5,000	4,000	1,000
<b>Other Program Costs not described above (itemize)</b>				
1	Employee Recruitment & Screening	250	250	
2	Administrative Costs - HR - Accounting - Compliance - Billing-	53,782	33,582	20,200
3	Misc- Client IDs -Birth certificates	500	-	500
<b>Total Program Budget</b>		427,625	216,720	210,905
<b>Budget Narrative</b>	The "Security services Mecca & DHS offices" line item is comprised of a set at a monthly amount that is paid to the security alarm company to increase the security for the Mecca and Desert Hot Springs offices.			

## Line Item Budget Sheet 2 - Labor Costs

<b>Staff Salaries</b>			% of Time Allocated to Program	Actual Program Salary	Amount of Salary Paid by DHCD Grant
Employee Position/Title		Annual Salary			
1	Shelter Staff 2 FTE (Indio Site)	75,293	100%	75,293	52,705
2	Case Manager / Employment Specialist (Desert Hot Springs Site)	46,800	100%	46,800	46,800
3	Case Manager / Employment Specialist (Indio Site)	46,800	100%	46,800	46,800
4	Case Manager / Employment Specialist / ESL Instructor (Mecca Site)		50%	23,400	23,400
5	Case Manager / Employment Specialist	46,800	100%	46,800	-
6	Case Manager / Employment Specialist	46,800	100%	46,800	-
7	Program Mang.	90,000	30%	27,000	-
8		-		-	-
<b>Enter this amount in Section 1, Employee Salaries</b>				<b>Total &gt;</b>	169,705
<b>Budget Narrative</b>	Fully describe costs listed above in this cell (B12). All salary costs are calculated for Direct Program Staff with full employee benefits.				
<b>Consultants/Contractors</b>			Hours/ Week	Monthly Fee	Amount of Salary Paid by DHCD Grant
Consultant/Contractor Name		Hourly Rate			
1					
2					
3					
4					
5					
6					
7					
8					
<b>Enter this amount in Section 1, Professional Services/Consultants</b>				<b>Total &gt;</b>	0
<b>Budget Narrative</b>	Fully describe costs listed above in this cell (B24).				

## Line Item Budget - Other Program Funds

<b>Funding for this program received from other sources</b>		<b>Amount</b>
Fees		
Donations		60,720
Grants (List Organizations)		
1	ESG - Cares-	17,000
2	CACAFP State of CA	5,000
3	CSBG - Community Action	20,000
4	City of La Quinta	22,500
5	HEAP	40,000
6	Pacific Premier Bank	10,000
7	HAPP	22,500
8		-
9		-
10		-
11		
12		
13		-
14		-
15		-
16		
Fundraising (describe nature of fundraiser)		
		-
Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)		
1	Martha's Thrift Store	19,000
2		-
3		-
4		
<b>Total funding in addition to DHCD request</b>		<b>216,720</b>
<b>Budget Narrative</b>	<p style="color: red;">Fully describe program income listed above in this cell (B19). Note whether income is "projected" or actual.</p> <p style="color: red;">All numbers are actual awarded or historically awarded and fundraised amounts. Martha's historically raises between 1.4 Million to 1.9 million annually.</p>	

## Grant Scoring Review

### Grant Staff Review # 1 of 3

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**Executive Summary:** 10

**Community Need and Alignment:** 9

**Goals:** 8

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 8

**Organizational Sustainability:** 10

**Budget:** 8

**Key Partners/Collaborations:** 10

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**Total Score:** 72.00

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**Reviewer Comments:** Martha's Village and Kitchen has always taken initiative and adapted/developed more ways to better serve and better reach those experiencing homelessness. Our funding is helping Martha's to provide 10 additional beds at their main campus in Indio and expanding their case management and wrap-around services at two new locations: Mecca and Desert Hot Springs. The expansion of homeless housing beds will help increase the number of individuals that transition into stable housing. The extension of case management and wrap-around service will help empower more individuals with the tools and resources needed to secure employment and target other personal assistance services they may need for upward mobility. I recommend funding this expansion as it directly aligns with the District's focus of increasing case management and wraparound services for individuals and families experiencing homelessness.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 74 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 222 (3 of 3)

**Total average proposal score: 91.5/100**



## Grant Scoring Review

### Grant Staff Review # 2 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 10

**Goals:** 10

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 10

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 10

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**Total Score:** 76.00

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**Reviewer Comments:** Martha's Village & Kitchen has been serving the homeless individuals for the past 3 decades. MV&K meet the essential needs of the homeless by providing shelter, housing and wrap around services, leading the individuals on a pathway to stable housing and employment. This proposed homeless housing, case management, and wraparound services with enhanced employment services is a expanded project to reduce barriers, increase opportunities and meet essential needs of homeless individuals and families in the Coachella Valley.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 74 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 222 (3 of 3)

**Total average proposal score: 91.5/100**

## Grant Scoring Review

### Grant Staff Review # 3 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 10

**Goals:** 9

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 10

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 9

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**Total Score:** 74.00

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**Reviewer Comments:** Martha's Village and Kitchen has a successful track record of addressing homelessness through their various programs and services, while providing vital resources to near homeless and homeless community members. DHCD grant funds will increase Martha's Village and Kitchen capacity by at their Indio shelter by an additional 10 beds, and open up two satellite locations in Mecca and Desert Hot Springs, where supportive services will be provided to 75 individuals at each location. I support providing these proposed grant funds to Martha's Village and Kitchen to continue to address the ever-increasing homeless problem in the Coachella Valley.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 74 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 222 (3 of 3)

**Total average proposal score: 91.5/100**

## Grant Scoring Review

### Fiscal Staff Review # 1 of 2

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**Fiduciary Compliance:** 8

**Financial Stability:** 9

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**Total Score:** 17.00

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**Reviewer Comments:** Audited financial statements reviewed by board regularly, cash flow negative at end of fiscal year due to investing activities and assets will satisfy liabilities. Strategic plan provides multiple levels of short- and long-term growth utilizing multiple sources of funding. Grant amount is reasonable in comparison to 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: 74 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 222 (3 of 3)

**Total average proposal score: 91.5/100**

## Grant Scoring Review

### Fiscal Staff Review # 2 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 demonstrates financial compliance...unmodified audit reports accepted by Board, positive cash flow, Current Ratio is 2:1 (demonstrating ability to pay current liabilities)

The grant request represents approximately 50% of the total program budget and is supported by multiple funding sources and the grantee's strategic plan.

### **Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 74 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 222 (3 of 3)

**Total average proposal score: 91.5/100**



## FY 2020-2021: Grant Application Scoring Rubric



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

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

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

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

**Recommendation:**

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





**Date:** 3/09/2021

**To:** Program Committee

**Subject:** Grant # 1171 Blood Bank of San Bernardino and Riverside Counties Inc

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**Grant Request:** Bloodmobiles for Coachella Valley

**Amount Requested:** \$150,000.00

**Project Period:** 4/1/2021 to 9/30/2022

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

LifeStream Blood Bank was established to meet community's need for a safe supply of blood and blood components. Over the years, LifeStream has evolved to provide donors with valuable health information in the form of a "mini-physical". The "mini-physical" assesses each person's pulse, temperature, blood pressure, cholesterol, and hemoglobin. This extra service can help provide donors with an "early warning" for undiagnosed health problems. Additionally, when COVID-19 hit, LifeStream evolved further and began testing all blood donations for COVID antibodies. In 2020, COVID-19 antibody testing helped increase blood donations, provided a valuable community service to donors, and resulted in the collection of COVID-19 convalescent plasma that helped treat patients infected with the virus.

LifeStream has successfully developed forecasting and tracking systems to ensure daily, monthly, and annual supply goals are achieved for the hospitals and medical facilities in the Coachella Valley. This data is constantly being reviewed so their team can take any necessary actions and react swiftly to ensure they are on track to meeting established targets.

Recently, State and Federal vehicle emission standards have been changed and LifeStream is required to purchase new bloodmobiles because of government mandates. Funding from the District will help offset the purchase of a bloodmobile and the purchase of 12,000 COVID antibody test kits.

**Strategic Plan Alignment:**

Healthcare Infrastructure and Services / Increase the number of mobile and portable medical units



**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Indian Wells; La Quinta; Palm Desert; Palm Springs; Rancho Mirage; Thousand Palms

**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 \$150,000.00 be approved.
- Recommendation with modifications
- Deny

## Full Grant Application Summary

### **Blood Bank of San Bernardino and Riverside Counties Inc, Grant #1171**

#### **About the Organization**

Blood Bank of San Bernardino and Riverside Counties Inc  
384 West Orange Show Road  
San Bernardino, CA 92408  
Tel: (909) 885-6503  
<http://www.lstream.org>

#### **Primary Contact:**

Daniel Ballister  
Tel: (909) 885-6503  
Fax: (909) 890-9816  
[dballister@lstream.org](mailto:dballister@lstream.org)

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

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
2010	Expanding Capacity at the Local Rare Blood Library	\$174,000	Achievement Building	1/25/2011	Grant budget
2016	LifeStream Prostate Cancer Treatment Program	\$60,000	Capital Improvement	10/25/2016	Grant budget

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

**Project Title:** Bloodmobiles for Coachella Valley

**Start Date:** 4/1/2021 **End Date:** 9/30/2022

**Term:** 18 months

**Total Project Budget:** \$500,000

**Requested Amount:** \$150,000

#### **Executive Summary:**

Celebrating its 70th anniversary in 2021, LifeStream Blood Bank was established to meet our community's need for a safe supply of blood and blood components. The niche filled by LifeStream has never been more vital and more relevant to the communities we serve.

As a result of governmental mandates, LifeStream Blood Bank needs to purchase two new bloodmobiles at a cost \$250,000 each to replace Coachella Valley-based bloodmobiles that no longer meet State and Federal vehicle emissions standards.

LifeStream utilizes bloodmobiles to conduct approximately 600 mobile blood drives a year in the Coachella Valley to supplement collection efforts at its local blood donor centers. Bloodmobiles make the donation process easy and convenient for donors and collect nearly half of all blood necessary to meet the needs of Coachella Valley trauma and cancer patients, mothers and their babies, and for surgeries at all area hospitals and medical facilities.

More than a traditional blood bank, LifeStream has evolved to offer a variety of life-saving blood products and community services that benefit thousands of area residents. While the primary purpose of mobile blood drives is to collect blood products, they also allow LifeStream to provide donors with valuable health information during the screening process. Mobile staff provide “mini-physicals” to thousands of potential donors in the Coachella Valley each year, with a substantial number residing in underserved east valley communities. The “mini-physical” assesses each person’s pulse, temperature, blood pressure, cholesterol, and hemoglobin. LifeStream personnel are trained to recognize issues that could provide an “early warning” for undiagnosed health problems. On many occasions, donating blood saved the donor’s life as well as the patient life they intended to save. This service is invaluable and one of the “hidden bonuses” of blood donation.

Additionally, all blood donations are tested for infectious diseases and the presence of COVID antibodies. In 2020, COVID-19 antibody testing helped increase blood donations, provided a valuable community service to donors, and resulted in the collection of COVID-19 convalescent plasma that helped treat patients infected with the virus. DHDF funding will allow LifeStream to test 12,000 donations over one year for the presence of COVID-19 antibodies.

A grant from the DHDF will help LifeStream purchase desperately needed bloodmobiles and COVID-19 antibody tests that will benefit thousands Coachella Valley residents of all ages and socio-economic backgrounds.

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

LifeStream Blood Bank needs to purchase two bloodmobiles, which cost \$250,000 each, to replace two older bloodmobiles that will be “retired” soon because they do not meet government mandates requiring improved vehicle emissions standards. The new bloodmobiles will serve the Coachella Valley including the underserved population who reside in the eastern portion of Riverside County.

Bloodmobiles are an essential component of LifeStream’s blood collections plan. In a typical year, LifeStream conducts approximately 700 mobile blood drives in the Coachella Valley to supplement collection efforts at its La Quinta and Rancho Mirage blood centers. Bloodmobiles are also crucial to LifeStream’s commitment to make it convenient for donors to give the gift of blood. In 2019, we collected 7,500 units from Coachella Valley blood drives to meet the needs of trauma and cancer patients, and for surgeries at medical facilities including Desert Regional Medical Center, Eisenhower Medical Center and John F. Kennedy Memorial Hospital. In 2020, we also began collecting “convalescent plasma” from donors who have recovered from COVID-19. This product is used to help patients suffering with COVID-19 infections. Without our

bloodmobiles, we would not be able to collect enough of these life-saving blood products to meet local patients' needs.

**Strategic Plan Alignment:**

Healthcare Infrastructure and Services / Increase the number of mobile and portable medical units

**Program/project description:**

Even though the primary purpose of mobile blood drives is to collect blood products, LifeStream staff provides donors with valuable health information during the screening process. LifeStream provides each potential donor with a "mini-physical" to assess each person's pulse, temperature, blood pressure, cholesterol, and hemoglobin. All blood donations are tested for infectious diseases including Hepatitis B, HIV, Hepatitis C, West Nile Virus, Chagas, and the presence of COVID antibodies. Those who test positive can potentially be recruited to donate convalescent plasma to help treat COVID patients.

In 2019, staff on our mobile units provided "mini-physicals" to 8,300 active donors in the Coachella Valley. Slightly more than 5,000 of these donors reside in east valley communities. LifeStream personnel are trained to recognize issues that could provide an "early warning" for undiagnosed health problems. On many occasions, we have found that the act of donating blood saved the donor's life as well as the patient life they intended to save. For example, blood donors assessed with an abnormal physical finding during the mini-physical (anemia, hypertension, irregular pulse, fever, etc.), who are referred to a physician for further work-up, have been diagnosed and treated for leukemia, thrombocytopenia, hemochromatosis, colon cancer, arrhythmia requiring surgical intervention, bacterial infections, malignant hypertension, and high cholesterol.

Our bloodmobiles allow us to communicate these serious health issues to donors in a convenient and secure location. Donors can then undergo potentially life-saving treatment by their healthcare provider. This service is invaluable and is one of the "hidden bonuses" of blood donation.

A grant from the DHDF, combined with other funds we expect to receive in 2021, will allow LifeStream to purchase these desperately needed bloodmobiles so that we may continue to provide essential services to tens of thousands of Coachella Valley residents over the next decade.

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

Mini-physicals are provided to all potential donors who are 15 years and older. Additionally, all residents of the Coachella Valley could conceivably benefit from the collection of blood and blood products if they are admitted to an area medical facility served by LifeStream Blood Bank.

**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Indian Wells; La Quinta; Palm Desert; Palm Springs; Rancho Mirage; Thousand Palms

**Age Group:**

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

**Total Number of District Residents Served:**

27,000

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b>                  LifeStream Blood Bank will use grant funding to test 12,000 Coachella Valley blood donors (approximately 1,000 each month) for antibodies to COVID-19. Donors who test positive for COVID-19 antibodies will be made aware of the test results and be recruited to donate COVID-19 Convalescent Plasma. COVID-19 Convalescent Plasma donations will be used by local hospitals to treat seriously ill COVID-19 patients.</p>	<p><b>Evaluation #1:</b>                  LifeStream has a sophisticated forecasting algorithm to ensure we have adequate appointments to meet our daily, weekly, and monthly collection goals. We will use this forecasting algorithm to ensure we are booking donor appointments at a weekly rate to ensure 1,000 donors are tested each month. In the event we forecast potential shortages in donor appointments in the Coachella Valley, we will increase our tele-recruiting efforts to donors in that area. Finally, we will track actual test results at the end of every month to ensure we achieved the testing of 1,000 donors in the Coachella Valley for antibodies to COVID-19.</p>
<p><b>Goal #2:</b>                  Funding will help LifeStream Blood Bank purchase a new bloodmobile that will be deployed to approximately 300 mobile blood drives and collect approximately 4,800 units of blood and other life-saving blood products each year for approximately ten years. Each unit of blood helps 3 people. Therefore, in one year, blood collection would essentially help 14,500 patients.</p> <p>The new bloodmobile will replace a bloodmobile that no longer meets State and Federal vehicle emissions guidelines. It will be equipped with a mobile ALYX system that is</p>	<p><b>Evaluation #2:</b>                  LifeStream uses a software system specifically dedicated to tracking and forecasting mobile blood drives. This system allows us the ability to forecast and track blood drives for the entire calendar year to ensure we meet our daily, weekly, and monthly collection goals. We will use this system to ensure LifeStream is securing monthly blood drives in the Coachella Valley to meet the 12-month goal of 300 drives annually. Additionally, we will track the success of each drive to ensure we met our projected goal and provided excellent customer service to</p>

<p>capable of collecting plasma (both transfusion and COVID Convalescent Plasma) or double-red blood cells at mobile blood drives.</p>	<p>each donor. This 12-month tracking and forecasting will begin once the new Coachella Valley mobile has been received and placed into service for LifeStream.</p>
<p><b>Goal #3:</b> Over a 12-month period, LifeStream bloodmobile staff will conduct 5,300 “mini-physicals” during the donor screening process at all blood drives in all communities, including underserved communities in the eastern portion of the county. Of those receiving mini-physicals, approximately 4,800 would be duplicative as their blood will also be tested and counted under Goal 1. However, about 500 people would not qualify to donate blood, but they would be given the mini-physical. Each “mini-physical” will assess each donor’s pulse, temperature, blood pressure, cholesterol, and hemoglobin. Additionally, all blood donations will be tested for infectious diseases including Hepatitis B, HIV, Hepatitis C, West Nile Virus, Chagas, and the presence of COVID-19 antibodies. Staff will communicate any serious health irregularities identified to donors and encourage them to consult their healthcare provider to discuss potentially life-saving treatment for the identified health issue. Additionally, donors will be given access to a secure online Donor Portal to review and track key results over multiple donations. LifeStream would gladly share the Desert Healthcare District’s medical service referral materials with donors who do not have established relationships with a physician.</p>	<p><b>Evaluation #3:</b> LifeStream has a sophisticated forecasting algorithm to ensure we have adequate appointments to meet our daily, weekly, and monthly collection goals. We will use this forecasting algorithm to ensure we are booking donor appointments at a weekly rate to ensure adequate numbers of potential donors are scheduled at mobile blood drives to meet the 12-month goal of screening 5,300 donors. In the event we forecast potential shortages in donor appointments in the Coachella Valley, we will increase our tele-recruiting efforts to donors in that area. This 12-month tracking and forecasting will begin once the new Coachella Valley mobile has been received and placed into service for LifeStream.</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**

LifeStream is only successful if we are able to meet the needs of our community. Therefore, we have developed sophisticated forecasting and tracking systems to ensure our daily, monthly, and annual goals are achieved. These tools include:

- A dedicated system to track future blood drives by location
- An appointment tracking system to monitor donor appointments and show rates
- Reporting capabilities to track actual donor collections compared to targeted goals

Data is reviewed each morning with our management team during a “production huddle”, which allows us to take appropriate and immediate actions, when necessary, to ensure all our goals are achieved.

We will forecast, track, and measure each of the three project goals with this exact same daily rigor. For example, if we forecast potential shortages in donor collections in the Coachella Valley, we will react swiftly to ensure we get back on course to meet the monthly established targets. We have a strong history of achieving daily, monthly, and annual goals and are confident that we will meet these project goals as well.

## **Organizational Capacity and Sustainability**

### **Organizational Capacity**

LifeStream employs trained professionals to conduct mobile blood drives. Each mobile team consists of an appropriate number of trained staff to ensure the highest level of safety for our donors. Every new employee must complete and pass an extensive eight-week training program before being assigned to the mobile team. This ensures we have a team of well-trained and dedicated employees on our mobile team. Additionally, to ensure we always have adequate staffing, we routinely forecast the need for new hires (taking into account resignations and routine turnover). LifeStream is confident that we already have the necessary resources in place to immediately deploy the replacement bloodmobiles.

Every “mini-physical” is conducted under strict standard operating procedures (SOPs) and all staff are assessed on competency at least annually. LifeStream personnel are trained to recognize issues that could provide an “early warning” for undiagnosed health problems.

All infectious disease testing and COVID-19 antibody testing is conducted by our national testing partner, Creative Testing Solutions (CTS).

### **Organizational Sustainability:**

Our strategic plan and success rely on the replacement of bloodmobiles that will no longer meet State and Federal vehicle emissions standards. Both Coachella Valley-based bloodmobiles must be replaced by December 31, 2021. Bloodmobiles play a crucial role in LifeStream’s ability to collect lifesaving blood for patients in the Coachella Valley. In fact, approximately half of LifeStream’s blood donations are collected on bloodmobiles. Therefore, without these Bloodmobiles, LifeStream would not be able to collect enough lifesaving blood to meet the community’s needs on an annual basis. Bloodmobiles provide LifeStream with an efficient, effective, and convenient way to reach large groups of blood donors at schools, businesses, churches, and government buildings. They are also essential in our effort to reach underserved populations of the communities we serve, especially people who do not live near our two Coachella Valley blood donor centers.

In 2020, we began offering COVID-19 antibody testing as a way to identify potential convalescent plasma donors. Additionally, donors have expressed significant interest in



their personal COVID-19 antibody test results, which has helped us increase our donor base.

## **Diversity, Equity, and Inclusion**

### **How is diversity, equity, and inclusion addressed?**

The LifeStream Board of Directors is currently comprised of 12 members. Currently, the board membership has 33% minority composition (3 Asian and 1 Hispanic) and 25% female composition. This past year, LifeStream focused its recruitment in the African American community to fill open board seats. In 2020, we interviewed and made offers to two (2) African American females to join the board, but both declined our offers because of other work and community commitments. We remain focused on filling at least one open board seat from the African American community. In 2021, LifeStream's new board Chairperson is female and its Vice Chairperson is Filipino.

The executive team is 40% female and 0% minority. The executive team has had little turnover during the past 15 years. We had one position open in the past 12 months and the position was filled with a Caucasian female.

Significant diversity is present in the Director/Manager level of the organization. Of the 23 management team members, 50% are Hispanic, 25% Caucasian, 15% Asian and 10% African American. Additionally, 70% are female. Our succession development plans are looking to these individuals to fill open positions on the executive team in the future.

**What is preventing the organization from addressing diversity, equity, and inclusion?** N/A

### **Partnerships:**

#### **Key Partners:**

The H.N. and Frances C. Berger Foundation has pledged a matching grant of \$50,000. Additionally, one of our major Coachella Valley healthcare partners, Desert Oasis Healthcare, has committed a \$25,000 contribution. We also anticipate receiving at least \$50,000 in grants from our other healthcare partners and an additional \$40,000 from several large businesses that supported LifeStream fundraising events in 2019 and 2020. Additional funds required to meet our goal of collecting \$250,000 for one bloodmobile will be realized through LifeStream's 2 for 2 Community Campaign.

We currently do not have any community partnerships in place to support our COVID-19 testing program.

## Erica Huskey

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**To:** Meghan Kane; Donna Craig  
**Subject:** RE: Blood Bank of San Bernardino and Riverside Counties - Grant #1171

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**From:** Dan Ballister <[ballisda@LStream.org](mailto:ballisda@LStream.org)>  
**Sent:** Thursday, February 25, 2021 12:21 PM  
**To:** Meghan Kane <[Mkane@dhcd.org](mailto:Mkane@dhcd.org)>  
**Subject:** Re: Blood Bank of San Bernardino and Riverside Counties - Grant #1171

Hi Meghan--

Thanks for talking with me today. Now that I have a better understanding of "duplicated" vs "unduplicated", I can offer this information.

For Goal 1, we would serve 12,000 people at our donor centers and mobile blood drives in one year.

For Goal 2, we would collect about 4,800 blood units at mobile drives during one year. Each blood unit typically helps 3 patients. In one year, our blood collection would essentially help 14,500 patients.

For Goal 3, we would provide "mini-physicals" for approximately 5,300 District residents during one year on the bloodmobile. Most of these people could be counted under Goal 1 because their blood would be tested. However, about 500 people would not be able to donate blood, but they would be given the mini-physical. Consequently, I would estimate 500 residents from this category should be included in our total number.

In summary, this grant would serve approximately 27,000 unduplicated residents in this first year. If we look at the big picture, the bloodmobile will serve approximately 20,000 unduplicated residents each subsequent year for at least 10 years.

Please let me know if you have any other questions or concerns.

Thanks,  
Dan

Dan Ballister  
Director, Community Development  
LifeStream Blood Bank  
384 West Orange Show Road  
San Bernardino, CA 92408

## 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>			0
<b>Equipment (itemize)</b>			
1                      One bloodmobile	250000	160000	90000
2			0
3			0
4			0
<b>Supplies (itemize)</b>			
1      12,000 COVID Antibodies Test Kits	60000	0	60000
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			0
2			0
3			0
4			0
<b>Total Program Budget</b>	<b>310000</b>	<b>160000</b>	<b>150000</b>
<b>Budget Narrative</b>	<p>LifeStream Blood Bank needs to purchase a new bloodmobile, which costs \$250,000, to replace an older bloodmobile that will be "retired" soon because it will no longer meet state and federal vehicle emissions standards. The new bloodmobile will serve the Coachella Valley including the underserved population who reside in the eastern portion of Riverside County. Bloodmobiles are an essential component of LifeStream's blood collections plan. In a typical year, LifeStream conducts approximately 700 mobile blood drives in the Coachella Valley to supplement collection efforts at its La Quinta and Rancho Mirage blood centers. Bloodmobiles are also crucial to LifeStream's commitment to make it convenient for donors to give the gift of blood. In 2020, LifeStream began testing donors' blood for COVID-19 antibodies. The offer to test blood donations for COVID antibodies proved to be an effective incentive to recruit blood donors during the height of the pandemic. Testing let donors know if they had been infected with the virus and helped LifeStream identify people who might be able to donate COVID convalescent plasma. Convalescent plasma is used by local hospitals and medical centers to treat patients seriously-ill from the virus.</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				
2				
3				
4				
5				
6				
7				
8				
<b>Total Employee Benefits</b>				
Enter this amount in Section 1; Staffing Costs			<b>Total &gt;</b>	<b>0</b>
<b>Budget Narrative</b>	N/A			
<b>Budget Narrative</b>	N/A			
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				
Enter this amount in Section 1; Staffing Costs			<b>Total &gt;</b>	<b>0</b>
<b>Budget Narrative</b>	N/A			

## Line Item Budget Other Program Funds

Other funding received (actual or projected) SPECIFIC to this program/project			Amount
<b>Fees</b>			
<b>Donations</b>			40000
<b>Grants (List Organizations)</b>			
actual	1	The H.N. and Frances C. Berger Foundation	50000
projected	2	Corporate and Community Foundations Grants	50000
	3		
	4		
<b>Fundraising (describe nature of fundraiser)</b>			
	1	LifeStream 2 for 2 Community Campaign	20000
	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>160000</b>
<b>Budget Narrative</b>	<p>LifeStream has received a \$50,000 matching grant from The Berger Foundation. Based on recent conversations, we also project receiving at least \$50,000 in grants from other corporate and community foundations. We expect to receive \$40,000 in donations from vendors and other business partners. Through the LifeStream 2 for 2 Community Campaign that will be held from January through April 2021, we project raising an additional \$20,000 from our base of blood donors, the general public and small businesses that host blood drives. All of these funds will be dedicated to the purchase of a new bloodmobile that will be based in Coachella Valley.</p>		

## Grant Scoring Review

### Grant Staff Review # 1 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 8

**Goals:** 9

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 9

**Budget:** 9

**Key Partners/Collaborations:** 8

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**Total Score:** 70.00

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**Reviewer Comments:** LifeStream is well established in the community as they collect nearly half of all blood necessary to meet the needs of Coachella Valley hospitals and medical facilities. LifeStream evolved over the years to provide “mini-physicals” to its donors that help to recognize and provide donors with early warning signs for various health problems. When COVID-19 hit, they evolved even further and began testing blood donations for COVID antibodies. This resulted in the collection of COVID-19 convalescent plasma that helped treat patients infected with the virus. Due to new State and Federal vehicle emission standards, LifeStream needs to begin the process of replacing the vehicles that serve the Coachella Valley. Our funding will help replace one of their vehicles and allow them to continue blood drives across the valley, the collection of convalescent plasma, and providing “mini-physicals” to donors. This funding request directly aligns with the District’s focus area of healthcare infrastructure and service - increasing the number of mobile and portable medical units.

### **Response Notes:**

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

Fiscal Staff Review Stage: 18.5 (2 of 2)

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

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

Fiscal Staff Review Stage: 37 (2 of 2)

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

**Total average proposal score: 88.5/100**

## Grant Scoring Review

### Grant Staff Review # 2 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 9

**Goals:** 10

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 9

**Budget:** 8

**Key Partners/Collaborations:** 9

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**Total Score:** 72.00

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**Reviewer Comments:** The District's continued funding of this vital organization is integral to meeting the community's need for a safe supply of blood and blood components. In fact, every blood unit collected helps 3 people. A new blood mobile that meets emission standards is necessary so as to not interrupt the collection, screening, and delivery process. It is noted that 50% of LifeStream's blood donations are collected on bloodmobiles. Another bonus is the testing of blood donations for COVID-19 antibodies, resulting in COVID-19 convalescent plasma, thus successfully able to treat patients infected with the virus. As a blood donor myself, I recommend approval of this funding request.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 18.5 (2 of 2)

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

**Sum of all Reviews:**

Fiscal Staff Review Stage: 37 (2 of 2)

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

**Total average proposal score: 88.5/100**

## Grant Scoring Review

### Grant Staff Review # 3 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 9

**Goals:** 9

**Proposed Evaluation Plan:** 8

**Applicant Capacity and Infrastructure:** 8

**Organizational Sustainability:** 8

**Budget:** 9

**Key Partners/Collaborations:** 8

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**Total Score:** 68.00

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**Reviewer Comments:** Blood Bank Of San Bernardino And Riverside Counties proposal provides three services vital to our community in various aspects. The screening and recruitment of potentially COVID-19 donors will provide much needed COVID-19 plasma that can potentially save lives. The collection of blood from donors to supply local blood banks is another potentially life saving activity proposed under this grant application. Lastly, the mini physicals can detect potential health problems and connect community members with the appropriate medical providers. I support the approval of this grant application.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 18.5 (2 of 2)

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

**Sum of all Reviews:**

Fiscal Staff Review Stage: 37 (2 of 2)

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

**Total average proposal score: 88.5/100**



## 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:** Audited financial statements reviewed and approved by Board. Sufficient assets to meet liabilities and positive cash flow documented. Strategic plan in place and budget includes multiple sources of funding.

**Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 18.5 (2 of 2)

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

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

Fiscal Staff Review Stage: 37 (2 of 2)

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

**Total average proposal score: 88.5/100**

## Grant Scoring Review

### Fiscal Staff Review # 2 of 2

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**Fiduciary Compliance:** 10

**Financial Stability:** 10

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**Total Score:** 20.00

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**Reviewer Comments:** Grantee demonstrates financial compliance...unmodified audit reports accepted by Board, has positive cash flow, Current Ratio is 2.0 (demonstrating ability to pay current liabilities)

The grant request is a portion of the total budget and is supported by diversified funding sources and the grantee's strategic plan.

### **Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 18.5 (2 of 2)

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

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

Fiscal Staff Review Stage: 37 (2 of 2)

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

**Total average proposal score: 88.5/100**



## FY 2020-2021: Grant Application Scoring Rubric



Category	Meets expectations <i>(10-6 points)</i>	Does not meet expectations <i>(0-5 points)</i>
<b>Programmatic Review</b>		
<b>Executive Summary</b> (10 points)	The applicant <b>includes and describes</b> the project’s mission and vision, the target population the project will serve, the expected benefits to the community, the need for the project in the community with proposed evidence-based methods, interventions, and strategies that are realistic, attainable, effective, and outcome-oriented.	The applicant is unclear or <b>does not include or describe</b> the project’s mission and vision, the target population the project will serve, the expected benefits to the community, the need for the project in the community with proposed evidence-based methods, interventions, and strategies that are realistic, attainable, effective, and outcome-oriented.
<b>Community Need &amp; Alignment</b> (10 points)	The applicant <b>identifies and defines a specific need(s)</b> for the project within the identified community and effectively describes the alignment of that need to one of the Desert Healthcare District and Foundation five strategic focus areas by using one 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.). The <b>applicant demonstrates</b> reliability for this kind of work (strength, a history or track record of achievements, related mission, and letters of support)</p>	<p>The applicant <b>does not include examples that demonstrate</b> the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.). The <b>applicant is limited in its ability to demonstrate</b> reliability for this kind of work (strength, a history or track record of achievements, related mission, and letters of support)</p>
<p><b>Organization Sustainability</b> (10 Points)</p>	<p>The applicant <b>demonstrates</b> that it has a current Strategic Plan with measurable outcomes and includes the proposed program. The applicant demonstrates strong Board engagement, governance, and fundraising support.</p>	<p>The applicant <b>does not sufficiently demonstrate</b> that it has a current Strategic Plan with measurable outcomes. The proposed program is not identified in the current Strategic Plan and the applicant organization has limited Board engagement, governance, and fundraising support.</p>

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

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

**Recommendation:**

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



**Date:** 3/09/2021

**To:** Program Committee

**Subject:** Grant # 1174 Mizell Center

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**Grant Request:** Geriatric Case Management Program

**Amount Requested:** \$100,000.00

**Project Period:** 4/1/2021 to 3/31/2022

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

Mizell Center has been serving the community for four decades and is an acknowledged leader in promoting healthy aging. COVID-19 has increased the services and demand needed to support seniors. In order to help meet the need, Mizell Center created a Geriatric Case Management Program. While Geriatric Case Management is a new service, it is an outgrowth of their work in assessing homebound Meals on Wheels clients and coordinating service linkages with Riverside County's Office On Aging.

The new program coordinates care and services for older adults with chronic conditions by assessing healthcare and supportive service needs and linking clients to vital services. Mizell's program enhances seniors' health and wellness, providing advocacy, resources, and service access to improve quality of life, increase functional independence, and prevent premature institutionalization.

District grant funds will partially support the salary of a Program Support Coordinator and the newly hired Director of Geriatric Case Management in order to provide case management services to at least 173 predominantly low-income older District residents aged 62 and above with chronic health conditions. These individuals will receive an assessment by Mizell Center's Geriatric Case Manager and Program Support Coordinator to evaluate service and resource needs and identify barriers to services.

**Strategic Plan Alignment:**

Vital Human Services to People with Chronic Conditions / Increased number of case managers



**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Mecca; North Shore; Palm Desert; Palm Springs; Rancho Mirage; Thermal

**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 \$100,000.00 be approved.
- Recommendation with modifications
- Deny



## Full Grant Application Summary

### Mizell Center, Grant #1174

#### About the Organization

Mizell Center  
480 S. Sunrise Way  
Palm Springs, CA 92262  
Tel: (760) 323-5689  
Fax: (760) 320-9373  
<http://www.mizell.org>

#### **Primary Contact:**

Harriet Baron  
Tel: (760) 323-5689  
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[harrietb@mizell.org](mailto:harrietb@mizell.org)

#### Historical (approved Requests)

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
1999	HealthLink	\$28,000	Grant	12/31/1999	
2000	FIND	\$25,000	Grant	12/31/2000	
2000	Outreach Low Income	\$25,000	Grant	12/31/2000	
2000	HealthLink	\$53,000	Grant	12/31/2000	
2000	Flu Shots	\$50,000	Grant	12/31/2000	
2001	HealthLink	\$52,229	Grant	12/31/2001	
2001	Flu Shots	\$50,000	Grant	12/31/2001	
2002		\$55,000	Grant	12/31/2002	
2003		\$20,000	Grant	12/31/2003	
2008	MEALS ON WHEELS	\$25,000	Grant	7/9/2008	Grant budget
2008	Congregate Meal Program	\$5,000	Food Assistance	1/27/2009	Grant budget
2009	Congregate Meal Program	\$5,000	Food Assistance	7/6/2009	
2009	Congregate Meal Program	\$5,000	Food Assistance	11/9/2009	Grant budget
2009	Congregate Meal Program	\$5,000	Food Assistance	3/11/2010	Grant budget
2010	Congregate Meal Program	\$5,000	Food Assistance	7/15/2010	Grant budget
2010	Congregate Meal Program	\$5,000	Food Assistance	11/8/2010	Grant budget
2011	Meals On Wheels	\$175,068	Achievement Building	7/26/2011	Grant budget

2011	Congregate Meals Program	\$20,000	Food Assistance	9/20/2011	Grant budget
2013	Matter of Balance Fall Prevention Implementation Study	\$4,850	Mini-Grant	6/2/2014	Grant budget
2014	Coachella Valley Senior Fall Prevention Program	\$403,300	Grant	5/26/2015	Grant budget
2017	A Matter of Balance Senior Falls Prevention Program	\$362,347	Grant	7/25/2017	Grant budget
2019	Mizell Center Meals on Wheels	\$10,000	Grant	4/1/2020	

### **Program/Project Information**

**Project Title:** Geriatric Case Management Program

**Start Date:** 4/1/2021 **End Date:** 3/31/2022

**Term:** 12 months

**Total Project Budget:** \$173,351

**Requested Amount:** \$100,000

### **Executive Summary:**

Mizell's Geriatric Case Management Program coordinates care and services for older adults with chronic conditions by assessing service needs and linking clients to vital services. Health Assessment & Research for Communities (HARC) reported that in 2019, 32.7% of Valley adults age 55 and older had incomes less than 201% of poverty level. Assistance needs included housing (8.8%), utilities (8.1%), financial (6.9%), transportation (6.7%), food (6.3%), and home healthcare (4.5%); 65.6% of all Valley adults had diagnosed chronic diseases. In 2018, HARC reported that 22% of seniors had diagnosed mental health disorders. Mizell's program enhances seniors' health and wellness, providing advocacy, resources, and service access to improve quality of life, increase functional independence, and prevent premature institutionalization. We support seniors' abilities to age in place, addressing broad spectrums of needs, exacerbated by COVID-19. This includes vulnerability to poor health outcomes and confronting intensified issues (i.e., deferred healthcare, isolation, and depression). HARC's COVID-19 Needs Assessment surveyed 624 Valley adults. Participants reported increased stress (60.2%), anxiety (59.1%), and depression (39.8%); and difficulty affording housing (45%); utilities (37.9%); food (24.3%); and healthcare (15.4%).

To promote healthy aging and address chronic health conditions, case managers assess service and resource needs; identify barriers; develop case plans with timelines for achieving goals; facilitate health and benefits applications, caregiver consultations, crisis intervention, budgeting/bill paying, transportation access, legal documents status (i.e., wills, and advance directives); and provide linkage to healthcare professionals, Social Security, Medicare/Medi-Cal, In Home Supportive Services, and collaborative

partners that provide healthcare, emergency financial assistance, legal, food, and other services. The program fosters preventative screenings, decreasing preventable hospitalizations. Grant funds will support case management services to at least 173 predominantly low-income older District residents age 62 and above with chronic health conditions, including 20% from communities of color; 100% will receive assessments to evaluate service and resource needs and identify barriers. At least 87 clients will achieve one goal identified in case plans and be linked to at least three needed services or resources. Success will be measured by achievement of benchmarks, objectives and positive program outcomes tracked in spreadsheets, a database, and case notes. Quantitative data includes demographic information, number of sessions, and other data. Qualitative data include assessments; case plans; achievement of goals; resource/service linkages; and increased service to communities of color. Additional outcome indicators include client self-reporting of improved quality of life, reduced isolation, and increased service access.

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

Over the course of Mizell's four decades of service, seniors' needs have accelerated as they are living longer while struggling with fewer resources. COVID-19 has exacerbated needs to unprecedented levels. Health Assessment & Research for Communities (HARC) reported that in 2019, 32.7% of Valley adults age 55 and older had household incomes of 200% Federal Poverty Level or less. Assistance needs included housing (8.8%), utilities (8.1%), financial (6.9%), transportation (6.7%), food (6.3%), and home healthcare (4.5%); 4.5% reported physical or mental mistreatment or neglect. In 2018, HARC reported that 22% of seniors had diagnosed mental health disorders. HARC's COVID-19 Needs Assessment surveyed 624 Valley adults; 49.3% were diagnosed with comorbidities exacerbating COVID-19 complication risks, including hypertension (31.5%); respiratory disease (19.7%); heart disease (6.3%); or HIV (6.2%). Of those previously employed, 22.9% are now unemployed, impacting seniors' supplemental income. Participants reported decreased income (37.6%) and increased difficulty in paying for housing (45%); utilities (37.9%); food (24.3%); and healthcare (15.4%); 8.8% couldn't afford essentials; 7.0% couldn't access essentials, of which 34.1% had no help, likely causing serious distress. Participants reported increased stress (60.2%), anxiety (59.1%), and depression (39.8%). Our Geriatric Case Management Program assesses support needs and links seniors to vital services.

### **Strategic Plan Alignment:**

Vital Human Services to People with Chronic Conditions / Increased number of case managers

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

The program coordinates care and services for older adults with chronic conditions by assessing healthcare and supportive service needs and linking clients to vital services. HARC reports that 65.6% of Valley adults have diagnosed chronic diseases indicating unmet physical, behavioral health or care needs. This program emanates from Mizell's long-term work with homebound MOW clients, including assessing clients' needs and coordinating service linkage with Riverside County's Office On Aging. Mizell's program enhances seniors' health and wellness, providing advocacy, resources, and service access to improve quality of life, increase functional independence, and prevent premature institutionalization. The program supports seniors' abilities to age in place as

needs evolve, addressing broad spectrums of needs, exacerbated by COVID-19. This includes vulnerability to poor health outcomes and confronting intensified or previously nonexistent issues (i.e., deferred healthcare, isolation, depression, and essential products shortages). To promote healthy aging and address chronic health conditions, case managers assess service and resource needs; identify barriers; partner with clients to develop case plans with timelines for achieving goals; provide comprehensive reassessments; facilitate health and benefits applications, caregiver consultations, crisis intervention, budgeting/bill paying, transportation access, legal documents status assessments (i.e., wills, and advance directives); and provide linkage and advocacy with healthcare professionals, Social Security, Medicare/Medi-Cal, In Home Supportive Services, and collaborative partners that provide healthcare, emergency financial assistance, legal, food, and other services, including utilizing CVHIP. The program fosters preventative screening access, decreasing preventable hospitalizations. A licensed mental health clinician administers behavioral health assessments to identify previously undiagnosed signs of anxiety, depression, or dementia and makes treatment referrals. The program is launching with City of Palm Springs CDBG funding that is restricted to city residents. Support will facilitate District-wide expansion, particularly to low-income East Valley Hispanic residents.

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

HARC reported that in 2019 adults age 55 and older represented 46.3% of the Valley’s adult population; 68.4% were White, 28% Hispanic, 2.0% Black; 15.8% LGBT community members; 46.8% widowed, divorced, separated or single. Mizell’s senior clients reflect this population; 33% are from communities of color and 80% low-to-moderate income.

**Geographic Area(s) Served:**

Cathedral City; Coachella; Desert Hot Springs; Indio; Mecca; North Shore; Palm Desert; Palm Springs; Rancho Mirage; Thermal

**Age Group:**

(65+) Seniors

**Total Number of District Residents Served:**

173

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> By February 28, 2022, a minimum of 173 predominantly low-income older District residents age 62 and above with chronic health conditions, including 20% from Coachella Valley’s Latinx and African American communities, will have a received an assessment by Mizell Center’s</p>	<p><b>Evaluation #1:</b> The Director of Geriatric Case Management will monitor and track progress towards achieving the goal in conjunction with the Geriatric Case Manager and Program Support Coordinator, and under supervision of the Executive Director. The Coordinator will track quantitative data, including ethnicity/race, age, household income, number in household, language, and zip code in an Excel</p>
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<p>Geriatric Case Managers to evaluate service and resource needs and identify barriers to services.</p>	<p>spreadsheet. Qualitative data will include the number of case management sessions attended and completion of assessment on file. To ensure achievement of program enrollment from minority communities, staff will monitor client enrollment by ethnicity/race and increase outreach activities as required to senior and community centers in Cathedral City, Indio, Thermal, Coachella, and Mecca, and the James O. Jessie Desert Highland Unity Center in North Palm Springs. Staff will conduct annual client satisfaction surveys in English and Spanish to elicit qualitative feedback, including open-ended questions regarding program experience. Results will be presented to the Executive Director and Board and will be utilized to develop a plan of action to implement quality improvement in programs and services. The requested grant funding will service 173 clients, 58% of the projected 300 program clients to be served by Mizell during the 12-month grant period.</p>
<p><b>Goal #2:</b> By February 28, 2022, a minimum of 87 predominantly low-income older District residents age 62 and above with chronic health conditions will achieve a minimum of one goal identified in the Case Plans developed in collaboration with Mizell Center Geriatric Case Managers that identify short and long-term needs, goals, an action plan and timeline for achieving goals.</p>	<p><b>Evaluation #2:</b> Director of Geriatric Case Management will track and monitor goal progress on an ongoing basis in conjunction with Geriatric Case Manager and Program Support Coordinator. Program staff will track clients' achievement of goals in Excel spreadsheet and in case notes on file. Quantitative data tracked include number of case management sessions attended by clients and updated case plans on file. Qualitative data tracked include completion of clients' case plans, incorporating identification of clients' physical and behavioral health, financial, and quality of life goals; and number of goals achieved. Qualitative data and outcome indicators include percentage of clients meeting at least one identified service gap via achievement of goal, and percentage of clients reporting increased social service access, decreased isolation, and improved quality of life. Staff will conduct annual client satisfaction surveys in English and Spanish to elicit qualitative feedback, including open-ended questions regarding program experience. Results will be presented to Executive Director and Board and will be utilized to develop a plan of action to implement quality improvement in programs and</p>

	<p>services. Grant funds will service 87 clients, 58% of projected 150 program clients targeted to achieve this goal during 12-month grant period.</p>
<p><b>Goal #3:</b> By February 28, 2022, a minimum of 87 predominantly low-income older District residents age 62 and above with chronic health conditions will have been linked to a minimum of three services or resources identified in their Case Plan, including medical and/or behavioral health services, housing and financial assistance, benefits counseling, transportation access, caregiver support, and other needs.</p>	<p><b>Evaluation #3:</b> Director of Geriatric Case Management will monitor and track progress towards goal achievement in conjunction with Geriatric Case Manager and Program Support Coordinator. Program staff will track clients' achievement of goals in Excel spreadsheet and/or case notes on file. Quantitative data tracked include number of case management sessions clients attend and updated case plan on file. Qualitative data include identification of clients' needed services and resources assessed in case plans, including medical and/or behavioral health services, housing and financial assistance, benefits counseling, transportation access, caregiver support, and others; identification of potential providers to meet needs; identification of services or resources and providers to which clients are linked; and ongoing monitoring to ensure clients access services. Staff will conduct annual client satisfaction surveys in English and Spanish or upon program exit to elicit qualitative feedback, including improvement in quality of life, increased access to services, and open-ended questions regarding program experience. Results will be presented to Executive Director and Board and utilized to develop plan of action to implement quality improvement in programs and services. Grant funds will service 87 clients, 58% of projected 150 program clients targeted to achieve goal during grant period.</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**

Evaluation will be conducted by the Director of Geriatric Case Management. Mizell will measure success by achievement of benchmarks, objectives and positive program outcomes. Benchmarks include number of unduplicated clients participating in the program; number of clients receiving assessments; number of clients receiving case plans; achievement of goals identified in case plan; and linkage to needed services and resources either at the Mizell Center or through regional continuum of care partners. The Director of Geriatric Case Management, Geriatric Case Manager, and Program

Support Coordinator track quantitative and qualitative data utilizing an Excel spreadsheet and/or in case notes in client files. Quantitative data includes gender, age, zip code, household income, number in household, ethnicity, marital status, living situation, language spoken, the number of case management sessions attended, and other data. Qualitative data and outcome indicators tracked include completed client assessments; completed case plans with identification of goals, barriers, and needed services and resources; achievement of case plan goals; resource/service linkages; and a measurable increase in service to communities of color. Additional outcome indicators include client self-reporting of improvement in quality of life, reduction in isolation, and increase in service access as measured by surveys administered by program staff on a pre/post basis. Progress notes are maintained in confidential client files. Client satisfaction surveys in English and Spanish are administered annually or upon program exit. Information is used to develop an action plan addressing necessary changes to programs, services, and administrative operations. Program results are analyzed by staff under the direction of the Director of Geriatric Case Management and reported monthly to the Executive Director and at regular intervals to the Board of Directors. 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.

### **Organizational Capacity and Sustainability**

#### **Organizational Capacity**

While Geriatric Case Management is a new service, it is an outgrowth of our work in assessing homebound Meals On Wheels (MOW) clients and coordinating service linkages with Riverside County's Office On Aging (OOA) since 2012. We have provided these services to an average of 356 homebound clients annually over the past five years; typically 30% are from communities of color. While medical assessments are not part of this program, many MOW clients have co-morbid health conditions. Assessment services provided to homebound MOW clients will inform the services to be provided through the new Geriatric Case Management program, which will service a much broader senior population and develop long-term partnerships capable of meeting needs across the aging and health spectrums. We have begun implementation of the Geriatric Case Management Program effective February 2021 with the onboarding of the Program's Director Denise Woodruff, who brings eight years of experience in case management. Denise has extensive experience in providing case management for homeless and veteran populations, and those with behavioral health disorders. She has experience in developing case plans, vocational training, conflict resolution, benefits application, service coordination with community providers, and outreach. We will soon hire a case manager and support coordinator.

#### **Organizational Sustainability:**

Mizell is currently engaged in a Strategic Planning Process that began in fall 2020. While delayed due to a COVID-related closure, the process has resumed. Key plan areas focus on programs and services growth; financial stability; increasing agency-wide diversity, including clients, staff, board, and volunteers; improving client data capture; and increasing Valley-wide outreach. Programs and services growth identified in the planning process includes implementation of the Geriatric Case Management Program. When the plan is finalized, we will forward to DHCD. To enhance program sustainability, Mizell has secured a City of Palm Springs CDBG-CV grant in the amount

of \$55,800 for program implementation. We are aggressively seeking support from municipal, corporate and private sector funders that have historically partnered with us and identifying new funders to sustain program capacity going forward. Recent Mizell foundation and corporate funders include Bank of America, Wells Fargo, Jewish Federation of the Desert, SCAN Health Community Giving, H.N. & Frances C. Berger Foundation, Auen Foundation, Union Pacific Foundation, and Union Bank, among others. While fundraising events are currently on hold due to the pandemic, going forward our annual Gala raises significant program funding. We also receive significant donor support for programs throughout the year.

## **Diversity, Equity, and Inclusion**

### **How is diversity, equity, and inclusion addressed?**

In 2019, Mizell experienced a management transition, hiring a new Executive Director. He is working closely with the Board to address issues of increasing leadership diversity and inclusion to be more representative of the local senior population. HARC reported that in 2019, 68.4% of Valley seniors were White, a 13% decrease from 2016. Hispanics represented 28% of seniors, but 45% of overall adults, portending a rapidly diversifying senior population. Of Mizell's 14 member Board, 79% are seniors; 93% White 7% Hispanic; 43% female; and 29% LGBT community members. In the past year, we have accelerated diversity outreach, extending offers to three potential board members from communities of color, who ultimately declined. Of the five member executive staff, 80% are White; 20% Hispanic; 80% seniors; 60% female; and 60% LGBT community members. The Geriatric Case Management Program Director will join the executive staff. We will make every effort to outreach to communities of color during recruitment. Our overall staff is extremely diverse; 65% are from communities of color. In recent years, Mizell has focused efforts in outreach to the East Valley Hispanic community to ensure that our services are both available and culturally appropriate to this community.

### **What is preventing the organization from addressing diversity, equity, and inclusion?**

Increasing diversity, equity and inclusion at board and executive staff level are among Mizell's highest priorities. While we have been actively taking steps to increase diversity, we are not yet at the level we need to be. We are seeking board members that provide finance, program and legal expertise. As noted, we have recently extended offers to three ethnically diverse candidates, who were also recruited by multiple local boards and ultimately chose to serve other agencies. As noted, 65% of overall staff are from communities of color. As executive staff positions become vacant, we will seek to promote from within our diverse staff and/or outreach to communities of color to increasingly diversify our executive team. While we work towards addressing diversity, equity and inclusion among leadership, we continually ensure that clients receive effective, respectful services in a manner that is compatible with their culture, socio-economic status, language, age, gender and sexual orientation. Our programs and services are designed for the Valley's diverse populations. Bi-lingual staff and Spanish language forms and literature are available. In our Senior Nutrition Program, 30% of clients are now from communities of color, including 20% mono-lingual Spanish speaking.



**Partnerships:****Key Partners:**

Mizell is an active participant in the regional continuum of care. We collaborate with, receive referrals from, and provide referrals to a wide array of nonprofit service providers, healthcare providers, government agencies, faith-based organizations, and businesses to ensure service and resource access for clients. Mizell will make our case management services available to and coordinate Valley-wide senior services with Joslyn, Thermal, Indio, Coachella, Desert Hot Springs, and Cathedral City Senior Centers. Mizell refers seniors to Jewish Family Service of the Desert, Joslyn Center, and the Center for behavioral health assessments and outpatient treatment. We work with Alzheimer's Coachella Valley and Coachella Valley Alzheimer's Association for Alzheimer's education and patient and caregiver support. We collaborate with organizations that provide services for chronic health conditions, including stroke recovery, HIV, vision impairment, and cancer with Braille Institute, Desert AIDS Project, Neurovitality Center, and Desert Cancer Foundation. We coordinate food resources among FIND Food Bank, Hidden Harvest, and Mizell's Senior Nutrition Lunch and Meals On Wheels programs. Housing insecurity, financial assistance and additional programs for low income seniors are coordinated with Senior Advocates of the Desert, Martha's Village, Habitat for Humanity of the Coachella Valley, Well in the Desert, Salvation Army, Coachella Valley Rescue Mission, and Catholic Charities.

Transportation access is coordinated with Desert ARC and Sunline Transportation. We refer medical and behavioral health services to Desert Oasis Healthcare, Eisenhower Health, JFK and Desert Regional Medical Centers, and Riverside University Health System, among others. We maintain vital partnerships with Riverside County's Office on Aging, Department of Public Social Services and Adult Protective Services. We coordinate veteran-related benefits and services with Veteran's Administration. We work with local utilities companies to access the Low Income Home Energy Assistance Program and Lifeline telephone program for clients. Program staff utilize CVHIP to identify Valley resources and service providers.

## 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>		\$ 140,712	\$ 49,803	\$ 90,909
<b>Equipment (itemize)</b>				
1	Office equipment allocation to program	\$ 1,000	\$ 1,000	\$ -
2				\$ -
3				\$ -
4				\$ -
<b>Supplies (itemize)</b>				
1	Program & Office supplies	\$ 2,000	\$ 2,000	\$ -
2				\$ -
3				\$ -
4				\$ -
<b>Printing/Duplication</b>		\$ 2,000	\$ 2,000	\$ -
<b>Mailing/Postage</b>		\$ 1,000	\$ 1,000	\$ -
<b>Travel/Mileage</b>		\$ 500	\$ 500	\$ -
<b>Education/Training</b>		\$ 2,000	\$ 2,000	\$ -
<b>Office/Rent/Mortgage</b>		\$ -	\$ -	\$ -
<b>Telephone/Fax/Internet</b>		\$ 500	\$ 500	\$ -
<b>Utilities</b>		\$ 2,100	\$ 2,100	\$ -
<b>Insurance</b>		\$ 780	\$ 780	\$ -
<b>Other facility costs not described above (itemize)</b>				
1				\$ -
2				\$ -
3				\$ -
4				\$ -
<b>Other program costs not described above (itemize)</b>				
1	Program Outreach	\$ 5,000	\$ 5,000	\$ -
2	Indirect costs @ 10%	\$ 15,759	\$ 6,668	\$ 9,091
3				\$ -
4				\$ -
<b>Total Program Budget</b>		<b>\$ 173,351</b>	<b>\$ 73,351</b>	<b>\$ 100,000</b>
<b>Budget Narrative</b>	Equipment- \$1,000 is 5% program allocation of \$20,000 annual agency costs for photocopy, postage machine, & other equipment leasing; Program supplies- \$2,000 is allocated for office and program supplies; Printing/ Duplication- \$2,000 cost to develop program-specific materials, including graphic design and printing, and additional photocopy costs; Mailing/Postage-\$1,000 for annual postage costs for program; Travel/Mileage-\$500 is allocated for program staff mileage reimbursement; Education/ training- \$2,000 annual cost for professional development of program staff; Telephone/Internet- \$500 is 5% allocation of \$10,000 annual agency telephone and Internet costs; Utilities- \$2,100 is 5% allocation of \$42,000 annual agency utility costs; Insurance- \$780 is 5% allocation of \$15,600 annual agency liability insurance costs; Program Outreach- \$5,000 is allocated for annual program costs for outreach to community, including marketing and direct outreach to providers and stakeholders; Indirect costs- \$15,759 for indirect expenses is based on 10% of total program budget and includes costs of human resources, payroll, accounts payable and receivable, executive oversight, fundraising and general administration, among other costs.			

### 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	Director of Geriatric Case Management	\$ 72,800	100%	\$ 72,800	\$ 55,190
2	Geriatric Case Manager	\$ 45,760	50%	\$ 22,880	\$ -
3	Program Support Coordinator	\$ 37,440	50%	\$ 18,720	\$ 18,720
4		\$ -	0%	\$ -	\$ -
5					
6					
7					
8					
<b>Total Employee Benefits</b>				\$ 26,312	\$ 16,956
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt; \$140,712</b>	<b>\$ 90,866</b>
<b>Budget Narrative</b>	Director of Geriatric Case Management provides program oversight and development, client assessments, community outreach, and other activities; Geriatric Case Manager provides client intakes and assessments, and assists with program development, community outreach, and other activities; and Program Support Coordinator assists with all aspects of program administration and implementation.				
<b>Budget Narrative</b>	Please describe in detail the employee benefits including the percentage and salary used for calculation. Benefits calculated @ 23% of salary include payroll taxes, workers compensation, & health insurance benefits.				
Professional Services / Consultants		Hourly Rate	Hours/Week	Monthly Fee	Fees Paid by DHCD Grant
<b>Company and Staff Title</b>					
1		\$ -	0	\$ -	\$ -
2					
3					
4					
5					
<b>Enter this amount in Section 1; Staffing Costs (annual)</b>				<b>Total &gt; \$31,200</b>	<b>\$ -</b>
<b>Budget Narrative</b>	Please describe in detail the scope of work for each professional service/consultant on this grant.				

## Line Item Budget Other Program Funds

Other funding received (actual or projected) SPECIFIC to this program/project		Amount
Fees		
Donations		
<b>Grants (List Organizations)</b>		
1	City of Palm Springs	\$ 55,800
2		
3		
4		
<b>Fundraising (describe nature of fundraiser)</b>		
1		
2		
<b>Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)</b>		
1	General operating funds	\$ 17,551
2		
3		
4		
<b>Total funding in addition to DHCD request</b>		<b>\$ 73,351</b>
<b>Budget Narrative</b>	Describe program/project income listed above. Note whether income is "projected" or actual. Current program grant from City of Palm Springs provides funding through 6/30/21; general operating funds raised from individual giving program funds allocated to this program.	

## Grant Scoring Review

### Grant Staff Review # 1 of 3

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**Executive Summary:** 9

**Community Need and Alignment:** 10

**Goals:** 9

**Proposed Evaluation Plan:** 9

**Applicant Capacity and Infrastructure:** 8

**Organizational Sustainability:** 8

**Budget:** 8

**Key Partners/Collaborations:** 9

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**Total Score:** 70.00

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**Reviewer Comments:** Mizell's Geriatric Case Management Program coordinates care and services for older adults with chronic conditions by assessing service needs and linking clients to vital services. (Mizell staff has also been trained in the utilization of CVHIP). Although the Geriatric Case Management Program is a new service, it is an outgrowth of the organization's work in assessing homebound Meals On Wheels clients and coordinating service linkages with Riverside County's Office on Aging since 2012. Geriatric Case management program is launching with the City of Palm Springs CDBG funding that is restricted to city residents. Support from the District will facilitate Coachella Valley-wide expansion.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 69 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 207 (3 of 3)

**Total average proposal score: 86.5/100**

## Grant Scoring Review

### Grant Staff Review # 2 of 3

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**Executive Summary:** 8

**Community Need and Alignment:** 9

**Goals:** 8

**Proposed Evaluation Plan:** 8

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 9

**Budget:** 8

**Key Partners/Collaborations:** 9

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**Total Score:** 68.00

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**Reviewer Comments:** Mizell Center proposal will add Geriatric Case Managers to provide much needed health assessments to older adults and connect them with vital programs and services, while establishing Care Plans to develop short-term and long-term goals to address key health needs. The need for type of service has increased dramatically due to the COVID-19 epidemic, which has impacted older adults disproportionately the most. I support the approval of 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: 69 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 207 (3 of 3)

**Total average proposal score: 86.5/100**

## 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:** 9

**Applicant Capacity and Infrastructure:** 9

**Organizational Sustainability:** 8

**Budget:** 8

**Key Partners/Collaborations:** 10

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**Total Score:** 69.00

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**Reviewer Comments:** Mizell Senior Center is introducing a new Geriatric Case Management service; however, it is building off their already well establish work assessing homebound Meals on Wheels clients and coordinating service linkages with Riverside County's Office on Aging. Coordinating this new service will help Mizell expand their reach across the Coachella Valley while enhancing their resource support coordination, further promoting healthy aging, and helping to address chronic health conditions. Mizell continues to evolve to address the health needs of seniors that have been further exacerbated by COVID-19 and work to empower and encourage healthy aging. This program directly relates to the District's focus area of providing vital human services to people with chronic conditions through increased case managers.

**Response Notes:**

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**Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 69 (3 of 3)

**Sum of all Reviews:**

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 207 (3 of 3)

**Total average proposal score: 86.5/100**

## 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 demonstrates financial compliance...unmodified audit reports accepted by the Board, possesses positive cash flow and net income, Current Ratio is 1.7:1 (demonstrating ability to pay current liabilities)

The grant request is a 58% of the program budget and is supported by two other funding sources and the grantee's strategic plan.

### **Response Notes:**

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### **Average Review Score:**

Fiscal Staff Review Stage: 17.5 (2 of 2)

Grant Program Staff Review Stage: 69 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 207 (3 of 3)

**Total average proposal score: 86.5/100**



## Grant Scoring Review

### Fiscal Staff Review # 2 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:** Financial statements prepared and reviewed by board. Cash flow was positive for 2020 and assets sufficient to meet liabilities. Strategic plan available and grant amount is reasonable in comparison to 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: 69 (3 of 3)

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

Fiscal Staff Review Stage: 35 (2 of 2)

Grant Program Staff Review Stage: 207 (3 of 3)

**Total average proposal score: 86.5/100**



## FY 2020-2021: Grant Application Scoring Rubric



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

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

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

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

**Recommendation:**

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