



**DESERT HEALTHCARE FOUNDATION  
PROGRAM COMMITTEE  
Special Meeting of the Program Committee Meeting  
January 22, 2020  
2:00 P.M.**

**Or Immediately Following the Program Committee Desert Healthcare District Meeting**

Palm Desert Chamber of Commerce  
Conference Room 3  
72559 CA-111  
Palm Desert, CA 92260

***This meeting is handicapped-accessible***

<b>Page(s)</b>	<b>AGENDA</b>	<b>Item Type</b>
	<b>I. Call to Order</b> – Director Carole Rogers, RN, Committee Chairperson	
<b>1-2</b>	<b>II. Approval of Agenda</b>	<b>Action</b>
	<b>III. Public Comments</b> At this time, comments from the audience may be made on items <u>not</u> listed on the agenda that are of public interest and within the subject-matter jurisdiction of the District. The Committee has a policy of limiting speakers to not more than three minutes. The Committee cannot take action on items not listed on the agenda. Public input may be offered on an agenda item when it comes up for discussion and/or action.	
	<b>IV. New Business</b>	
	1. Consideration to approve the following grant proposals through the East Valley Funding Allocation	
<b>3-22</b>	a. Grant #1035 – Angel View: <i>Angel View Children’s Outreach (East Valley)</i> – \$50,000	<b>Action</b>
<b>23-40</b>	b. Grant#1036 – Pueblo Unido: <i>Fostering Healthy Communities</i> - \$50,000	<b>Action</b>
<b>41-58</b>	c. Grant #1038 – Coachella Valley Volunteers in Medicine: <i>Affordable and Accessible Healthcare Services for East Valley Residents</i> – \$50,000	<b>Action</b>
	<b>V. Old Business</b>	
	1. Homelessness Initiative Update	Information
	2. Behavioral Health Initiative Update	Information
	<b>VI. Committee Member Comments</b>	



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- VII. Adjournment**  
Next Scheduled Meeting February 11, 2020



**Date:** 1/22/20

**To:** Program Committee

**Subject:** Grant # 1035 Angel View, Inc.

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**Grant Request:** Angel View Children's Outreach - East Valley

**Amount Requested:** \$50,000.00

**Project Period:** 2/1/2020 to 1/31/2021

**Project Description and Use of District Funds:** Once children's medical conditions are verified by their physicians or Inland Regional Center, our bilingual case managers will provide individualized assistance. We will connect families to safety net services including health insurance and provide: 1) resources/referrals and help accessing services; 2) insurance advocacy; 3) mini-grants for medical equipment, supplies and services not covered by insurance; 4) medical transportation reimbursement; 5) family stabilization, 6) parent support groups, and 7) IEP support. Our staff will attend IEP meetings to advocate for clients and help parents with language barriers understand the outcomes, documentation needs, etc. Additionally, because few specialty medical services are offered to kids with disabilities at the new Loma Linda clinic in Indio, we will continue to provide transportation reimbursement for miles traveled to access care outside the valley. Also when needed, we will offer more individualized counseling around issues that affect children's health and well-being. E.g., parents may not know how to calendar kids' medical appointments and arrange transportation, or plan for contingencies (like a car breaking down) that can cause children to miss critical monitoring appointments with their doctors. And because whole families are affected by children's disabilities, often, siblings feel neglected and start acting out – missing school or getting into trouble. Our case managers will meet with families to set mutually agreed upon behavioral health goals and follow up regularly. Our goal is to create more stable family environments in order to support the health of children with disabilities.

**Strategic Plan Alignment:** Primary Care and Behavioral Health Access

**Geographic Area(s) Served:** Coachella



**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 \$50,000.00 be approved.
- Recommendation with modifications
- Deny

## 2019 Grant Request Summary

### Angel View, Inc., Grant #1035

#### About the Organization

Angel View, Inc.  
12379 Miracle Hill Road  
Desert Hot Springs, CA 92240  
Tel: 760-329-6471  
Fax: (760) 329-9024  
www.angelview.org

#### **Organization Type:**

501(c)(3) \Medical

#### **Primary Contact:**

Amanda Galindo  
Tel: (760) 329-6471  
Fax: (760) 329-9024  
agalindo@angelview.org

#### Historical (approved Requests)

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
2001		\$10,000	Grant	12/31/2001	
2002		\$10,000	Grant	12/31/2002	
2005	Hydrotherapy program	\$40,000	Grant	9/27/2005	Grant budget
2007	Construction and equipment funding	\$86,000	Grant	10/29/2007	Grant budget
2008	Type II Paratransit Van purchase	\$57,640	Grant	1/27/2009	Grant budget
2008	Angel View Food Program	\$5,000	Food Assistance	3/26/2009	
2008	Angel View Crippled Children's Foundation Food Program	\$5,000	Food Assistance	5/19/2009	
2009	Angel View Food Program	\$5,000	Food Assistance	8/31/2009	Grant budget
2009	Angel View Crippled Children's Foundation Food Program	\$5,000	Food Assistance	12/9/2009	Grant budget
2009	Angel View Food Program	\$5,000	Food Assistance	3/9/2010	Grant budget
2009	Angel View Crippled Children's Foundation Food Program	\$5,000	Food Assistance	6/28/2010	Grant budget
2010	Angel View Low-Wage Healthcare Worker Life Improvement Pilot Program	\$61,895	Improving Lives	7/28/2010	Grant budget
2010	Angel View Crippled Children's Foundation, Inc. Food Program	\$5,000	Food Assistance	10/12/2010	Grant budget

2010	Angel View Crippled Children's Foundation, Inc. Food Program	\$5,000	Food Assistance	1/12/2011	Grant budget
2010	Angel View Crippled Children's Foundation, Inc. Food Program	\$5,000	Food Assistance	4/6/2011	Grant budget
2011	Angel View Crippled Children's Foundation, Inc. Food Program	\$5,000	Food Assistance	7/12/2011	Grant budget
2011	Angel View Crippled Children's Foundation, Inc. Food Program	\$15,000	Food Assistance	9/20/2011	Grant budget
2012	Angel View Day Program Expansion (Phase 3)	\$201,440	Grant	3/12/2013	Grant budget
2012	Angel View Physical Activity Program for Children and Adults with Developmental and Physical Disabilities	\$54,400	Grant	6/25/2013	Grant budget
2015	Angel View Outreach Family Stabilization Program	\$142,551	Grant	6/28/2016	Grant budget

### **Proposal**

**Project Title:** Angel View Children's Outreach - East Valley

**Total Project Budget:** \$423,632

**Requested Amount:** \$50,000

**Length of Project:** 12 months

**Start Date:** 1/1/2020

**End Date:** 12/31/2020

### **Background:**

Background

The goal of the Angel View Children's Outreach Program is to improve the health and wellness of Coachella Valley children with disabilities. Launched in 2012, the program helps meet the individualized needs of local families who struggle to raise children with disabilities. In 2020, we will help approximately 900 District residents (300 children + parents and siblings); 50% live in the East Valley. The vast majority of our East Valley clients are very low income; most are mono-lingual and unaware of even basic safety net services. Our project brings much needed bilingual, one-on-one services to East Valley kids with disabilities.

### **Community Health Focus Area**

Primary Care and Behavioral Health Access

### **Community Need:**

Angel View Children's Outreach Program improves access to care (accessibility, affordability, availability and acceptability of healthcare services) and education for residents. In 2020, our bilingual case managers will meet with nearly 900 District residents (300 children with disabilities, 300 parents, 300 siblings) to assess their children's individual needs. More than half of the families served will be East Valley residents. Those clients will be assisted at our Indio office. Once children's medical conditions are verified by their physicians, we will provide individualized assistance. We will connect families to safety net services including health insurance and provide: 1) resources/referrals and help accessing services; 2) insurance advocacy; 3) mini-grants for medical equipment, supplies and services not covered by

insurance; 4) activity sponsorships; 5) parent support groups, and 6) IEP support. Our staff will attend IEP meetings to advocate for clients and help parents with language barriers understand the outcomes, documentation needs, etc. Additionally, because few specialty medical services are offered kids with disabilities at the new Loma Linda clinic in Indio, we will continue to provide transportation reimbursement for miles traveled to access care outside the valley. Also when needed, we will offer more individualized counseling around issues that affect children's health and well-being. E.g., parents may not know how to calendar kids' medical appointments and arrange transportation, or plan for contingencies (like a car breaking down) that can cause children to miss critical monitoring appointments with their doctors. And because whole families are affected by children's disabilities, often, siblings feel neglected and start acting out – missing school or getting into trouble. Our case managers will meet with families to set mutually agreed upon behavioral health goals and follow up regularly. Our goal is to create more stable family environments in order to support the health of children with disabilities.

Angel View Children's Outreach Program improves access to care (accessibility, affordability, availability, acceptability of healthcare services) and education for residents.

The U.S. Department of Agriculture estimates it costs almost \$250,000 to raise a healthy child to age 18, but it costs four-times that amount to raise a child with a disability. Per HARC, 6,300+ local families struggle to cover the astronomical cost. Many parents don't know their children are eligible for benefits, or how to apply to Regional Center, California Children's Services, IEHP or Medi-Cal.

Many kids with disabilities are raised in single parent homes with multiple siblings. Parents struggle to make ends meet and rarely have cash to cover the ongoing cost of medical equipment, supplies and services not covered by Medi-Cal.

In addition, our clients need medical care that for the most part, is provided by pediatric specialists outside of the valley. Transportation costs cause many families to forgo critical medical appointments. We provide mileage reimbursement to clients whose appointments are physician-verified.

In fiscal year 2017-18, we covered the cost of nearly 200,000 miles. But the need continued to grow. In 2018-19, we covered the cost of nearly 275,000 miles! At an average of 150 miles round-trip, we enabled kids to get to nearly 2,000 medical appointments. The new Loma Linda clinic in Indio has thus far not reduced the need; our clients still regularly travel to Loma Linda and other cities for specialty care.

Having a child with a disability wreaks emotional and economic havoc in a home. Many of our clients need case management/counseling to stabilize their families. Special education is another area of critical need. Many parents don't understand the need for or their responsibilities for their children's Individual Education Programs (IEPs). Our bilingual staff are school district-approved advocates for children in our program.

### **Program Area**

Direct Services\Disabled Services; Direct Services\Children Services

### **Project Description:**

Once children's medical conditions are verified by their physicians or Inland Regional Center, our bilingual case managers will provide individualized assistance. We will connect families to safety net services including health insurance and provide: 1) resources/referrals and help accessing services; 2) insurance advocacy; 3) mini-grants for medical equipment, supplies and services not covered by insurance; 4) medical transportation reimbursement; 5) family stabilization, 6) parent support groups, and 7) IEP support. Our staff will attend IEP meetings to

advocate for clients and help parents with language barriers understand the outcomes, documentation needs, etc. Additionally, because few specialty medical services are offered to kids with disabilities at the new Loma Linda clinic in Indio, we will continue to provide transportation reimbursement for miles traveled to access care outside the valley. Also when needed, we will offer more individualized counseling around issues that affect children’s health and well-being. E.g., parents may not know how to calendar kids’ medical appointments and arrange transportation, or plan for contingencies (like a car breaking down) that can cause children to miss critical monitoring appointments with their doctors. And because whole families are affected by children’s disabilities, often, siblings feel neglected and start acting out – missing school or getting into trouble. Our case managers will meet with families to set mutually agreed upon behavioral health goals and follow up regularly. Our goal is to create more stable family environments in order to support the health of children with disabilities.

**Proposed Program / Project Evaluation Plan**

Program evaluation is an important component. We track clients by city; the number of clients served; the children’s diagnoses; and the number of children needing referrals and resources, family stabilization, mileage reimbursement and mini grants. We also track the number of miles and mini grants awarded. Last fiscal year, for example, we reimbursed clients’ families for nearly 275,000 miles, which enabled children to get to approximately 2,000 critical medical appointments with specialists (primarily in Loma Linda). Additionally, we evaluate the effectiveness of the program on an ongoing basis. Since launching it in 2012, as we have learned from clients more about what they need, we have continuously massaged the program to be of more benefit to them. For instance, in 2013-14, many parents requested family support groups, which were not originally part of the program. To their gratitude, we added them and now conduct them regularly. Family stabilization/case management was likewise not part of the original program but was added because our outreach team was frequently asked to help siblings or parents with issues. It was apparent that all family members were being impacted by the children’s disabilities. To provide more stable environments for children with disabilities, Desert Healthcare District helped us expand/refocus the program. Now we are able to help them address the systemic problems in their homes; family stabilization is a very valuable and core part of the program.

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> Conduct 50 intakes on new East Valley clients to determine need. Prior to receiving services, all potential clients complete a one-on-one intake with one of our Outreach case managers. Each child’s medical condition is verified through Inland Regional Center or his/her medical provider.</p>	<p><b>Evaluation #1:</b> Since the inception of the Children’s Outreach Program, our staff has kept monthly tracking forms that indicate the number of new children with disabilities served, the number of repeat children, their cities or zip codes, children’s diagnosis codes, whether the head of the household is male or female, and the family’s income level. We use the tracking forms to complete reports to all grantors.</p>
<p><b>Goal #2:</b> Based on need, assist 75 East Valley families raising children with disabilities by providing resources and referrals as well as help accessing services. Assistance from our bilingual case managers includes helping families complete applications to safety net services, health insurance, etc.</p>	<p><b>Evaluation #2:</b> In addition to the information noted in Evaluation #1 above, program staff track how many families receive resources and referrals each month.</p>
<p><b>Goal #3:</b> Based on verified medical need, enroll 50 families raising children with disabilities in the transportation reimbursement component of the program (TRIP). Families approved for TRIP are</p>	<p><b>Evaluation #3:</b> Angel View partners with Independent Living Partnership (ILP) in Riverside. ILP administers the TRIP program throughout Riverside County. Angel View</p>



<p>reimbursed for miles traveled to access specialty medical care outside of the Coachella Valley, primarily in Loma Linda.</p>	<p>provides ILP with regular payments which ILP uses to pay to our clients on a reimbursement basis. Angel View staff help parents complete the monthly forms, which are sent to ILP for payment. We receive detailed reports each month from ILP showing how many miles were reported by each child's family, how many were approved and paid. The ILP MOU for fiscal year 2019-20 is attached to this application, along with letters of support.</p>
<p><b>Goal #4:</b> Based on need, enroll 25 families in the Family Stabilization component of the program. Family stabilization is a case management tool designed to strengthen the whole family to better support children with disabilities.</p>	<p><b>Evaluation #4:</b> In addition to the information noted in Evaluation #1 and Evaluation #2 above, program staff track how many families receive Family Stabilization services each month. Regarding the actual case management, our staff work with families to set individual goals. Through regular meetings with the families, they determine if the goals have been met or need to be adjusted. They continue to work with families on outstanding issues and/or new problems. Due to privacy issues, case notes are not available for monitoring; our tracking forms are however.</p>
<p><b>Goal #5:</b> Based on need, act as advocates for 25 children with disabilities at their Individual Education Program (IEP) meetings. Our staff are acknowledged by all local school districts to act as advocates for children with disabilities who are enrolled in our program. Each IEP meeting is actually a series of four meetings. They are very time consuming but extremely helpful to parents who often do not understand why their kids are in special education, what their responsibilities are, what the educational goals are, etc. Our staff explain meeting conversations and outcomes to the children's parents.</p>	<p><b>Evaluation #5:</b> Program staff also track which children's IEP meetings they attend each month. And similar to case management, the entire IEP team works with the individual student on goals the group sets for the child's educational progress. Goals are met or adjusted as needed. Please note -- some children/families receive multiple services; they are not mutually exclusive.</p>

**Participants:**

**Population Served**

Adults (25-64 years old)

**Geographical Area Served**

Coachella; Indio; La Quinta; Mecca; North Shore; Oasis; Thermal

**Age Group**

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

**Number Served Per Age Group****0-5:** 100**6-17:** 300**18-24:** 190**25-64:** 300**65 or more:** 10**Total:****Participant Community**

In general, the primary clients of our Children's Outreach Program are kids with disabilities, age 0-18. In providing assistance to the children, however, we also assist parents and siblings, hence the varied age groups listed below. Please note these are guesstimates - we have no way of knowing in advance the actual family structure of future clients. This specific project will serve only East Valley families, primarily very low income, who are struggling to raise children with disabilities in their own homes (i.e., not in Angel View homes).

**Organizational Capacity and Sustainability****Organizational Capacity**

Three full-time staff members are the program's primary resources. Amanda Galindo, Children's Outreach Program manager, holds a Master of Arts, Marriage and Family Therapy degree. She joined Angel View in 2012 to help manage and build the Children's Outreach Program. She has worked in youth services since 2005. She has been instrumental in helping to re-shape the program over the years, based on her experience with clients' needs, to provide more emphasis on case management and family stabilization. In her years with Angel View, she has personally met with and helped nearly 1,500 families. Anakaren Romero, ABA Therapist, is a case manager. She came to Angel View in August 2019 with experience in working with young children with disabilities. She was formerly a behavioral therapist at Easy Speech Therapy Center in Palm Desert. Earlier she was a behavior intervention aide at Palm Springs Unified School District. Michelle Salgado, the newest member of the team, is an Outreach Advocate. All of our team members are bilingual and extremely dedicated. Outreach staff work under the direction of Angel View's CEO Patti Park, who joined Angel View in early 2013. Previously, she was regional administrator for Washington's Department of Social and Health Services.

**Organizational Sustainability:**

Angel View's board adopted a Strategic Plan in 2013 (updated in 2017) recommitting the organization to serving the changing needs of local children and adults with disabilities. One important change in needs resulted from a state policy shift. Previously, the state more freely placed children with disabilities in group homes like ours. Now California does everything possible to keep families intact. As a result, thousands of local families, many extremely low income, are struggling to raise children with disabilities in their own homes.

To provide assistance to some of those children, in 2012, Angel View staff presented a new Children's Outreach Program to the board. Since the program provides all services at no cost to clients, and all funds must be raised through philanthropy, it was a big ask for the board to approve it. But rather than balk at the cost, the board was so impressed by the opportunity to provide new services to children, particularly East Valley kids, members voluntarily voted to double the budget.

The Children's Outreach Program has become an increasingly important part of our services to the community. The board continues to support it wholeheartedly. It is now identified as one of our core services.

## **Partnerships:**

### **Key Partners:**

Angel View collaborates with all local entities that provide services to people with disabilities. Our most important partners are organizations like Inland Regional Center, Independent Living Partnership, the Braille Institute, Easy Speech, Coachella Valley Autism Society, UCPIE, American Youth Soccer Organization's VIP Program (for kids with disabilities), etc., as well as all local school districts.

Inland Regional Center - collaborates with Angel View on clients services and parent support groups; Independent Living Partnership - administers Angel View's transportation reimbursement program; School Districts - Angel View staff serve as advocates for clients in Individual Education Program meetings; local special ed teachers and administrators frequently refer clients to us; AYSO VIP - since the Outreach program began in 2012, we have sponsored all kids with disabilities who want to play in the AYSO VIP league if they complete an Outreach intake.

All other providers of services to children with disabilities frequently refer clients to us and vice versa; often we assist the same clients, thereby expanding what one individual organization could provide in terms of assistance.

In addition, we work with other providers including speech therapists, to extend the benefits of their therapy. For example, a therapist may provide one of the kids we assist with a speech therapy device to use at the therapist's office. Through our mini-grant program, we could potentially provide the same device for home use, enabling the child to make considerably more progress.

## Line Item Budget

## Operational Costs

PROGRAM OPERATIONS		Total Program/Project Budget	Funds from Other Sources <i>Detail on sheet 3</i>	Amount Requested from DHCD
<b>Total Staffing Costs</b> <i>Detail on sheet 2</i>		221,413		50,000
<b>Equipment (itemize)</b>				
1				0
2				0
3				0
4				0
<b>Supplies (itemize)</b>				
1	Office supplies	1,050		0
2	Subscriptions	90		0
3				0
4				0
<b>Printing/Duplication</b>		2,000		0
<b>Mailing/Postage</b>				0
<b>Travel/Mileage</b>		18,000		0
<b>Education/Training</b>				0
<b>Office/Rent/Mortgage</b>				0
<b>Telephone/Fax/Internet</b>		1,738		0
<b>Utilities</b>				0
<b>Insurance</b>		832		0
<b>Other facility costs not described above (itemize)</b>				
1	Home office allocation	17,509		0
2				0
3				0
4				0
<b>Other program costs not described above (itemize)</b>				
1	TRIP client mileage reimbursement	125,000		0
2	Client special needs mini grants	35,000		0
3	Client activity sponsorships	1,000		0
4				0
<b>Total Program Budget</b>		<b>423,632</b>	<b>0</b>	<b>50,000</b>

### Line Item Budget Staffing Costs

Staff Salaries		Annual Salary	% of Time Allocated to Program	Actual Program Salary	Amount of Salary Paid by DHCD Grant
<b>Employee Position/Title</b>					
1	Program manager	\$96,820	100	\$96,820	\$25,000
2	Case manager	\$69,655	100	\$69,655	\$15,000
3	Outreach advocate	\$52,938	100	\$52,938	\$10,000
4					
5					
6					
7					
8				\$219,413	
<b>Total Employee Benefits</b>					
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt;</b>	\$50,000
<b>Budget Narrative</b>	The amounts above reflect annual salary and benefits. Base salaries are \$74,477 for the program manager, \$53,581 for the case manager and \$40,721 for the advocate.				
<b>Budget Narrative</b>	Benefits are calculated at the rate of 30% of the base salaries noted above and include vacation, holidays, sick days and health insurance.				
Professional Services / Consultants		Hourly Rate	Hours/Week	Annual Fee	Fees Paid by DHCD Grant
<b>Company and Staff Title</b>					
1	Summer Intern	\$17.25		\$2,000.00	\$0
2					
3					
4					
5					

## Line Item Budget Staffing Costs

Enter this amount in Section 1; Staffing Costs		Total ›	0
<b>Budget Narrative</b>	<p style="color: red;">We work with the CVEP/Health Career Connection each year to provide a paid internship to a student who is seeking a career in the field of healthcare. In 2020, our intern will work 40 hours per week for 10 weeks. The stipend is \$2,000. He/she will support the Outreach team by attending Outreach events, setting up appointments for Outreach staff to meet with new and existing clients, helping families complete mileage reimbursement requests and fill out other forms, etc.</p>		

**Line Item Budget**

**Other**

**Program Funds**

<b>Other funding received (actual or projected) SPECIFIC to this program/project</b>			<b>Amount</b>
<b>Fees</b>			\$0.00
<b>Donations</b>			\$60,000
<b>Grants (List Organizations)</b>			
	1	Anderson Children's Foundation	\$32,857
	2	City of Indio, City of CC, Riverside County	\$19,000
	3	Desert Clasic Charities	\$17,500
	4	Barker Foundation	\$17,500
<b>Fundraising (describe nature of fundraiser) (additional grants - not fundraisers)</b>			
	1	BIGHORN Charities	\$15,000
	2	Champions Foundation	\$6,000
<b>Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)</b>			
	1	Proceeds from sale of donated goods AV resale stores	\$155,500
	2	Additional grants not yet submitted	\$50,000
	3		
	4		
<b>Total funding in addition to DHCD request</b>			
<b>Budget Narrative</b>	<p>Angel View provides all services at no charge to Outreach clients, as such, 100% of the program budget is provided by philanthropy each year. Our primary sources of income are grants, proceeds from the sale of donated goods at Angel View's resale stores, and donations. Grant amounts noted under "Grants" and "Fundraising" are secure; the "Additional grants" have not yet been submitted but will be throughout the year. Other traditional funders include the Agua Caliente Band of Cahuilla Indians, Morongo Tribe of Cabazon Indians, H. N. and Frances C. Berger Foundation, the Chloe Crawford Foundation, and others. If awarded, District funds would be highly leveraged.</p>		

## Grant Scoring Review

**Reviewer:** Donna Craig

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**Executive Summary:** 9

**Need and Alignment:** 9

**Goals:** 8

**Evaluation:** 8

**Organizational Capacity:** 9

**Organizational Sustainability:** 9

**Budget:** 9

**Percent of Funding Requested:** 9

**Fiduciary Compliance:** 8

**Financial Stability:** 8

**Key Partners/Collaborations:** 8

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**Total Score:** 94.00

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**Reviewer Comments:** This program of Angel View's not only takes in the case management needs of the special needs client but also considers the needs of the entire family. A proven program with very good outcomes.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 95.333333333333333333333333333333 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 286 (3 of 3)



## Grant Scoring Review

**Reviewer:** Alejandro Espinoza

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**Executive Summary:** 9

**Need and Alignment:** 9

**Goals:** 9

**Evaluation:** 8

**Organizational Capacity:** 9

**Organizational Sustainability:** 9

**Budget:** 9

**Percent of Funding Requested:** 9

**Fiduciary Compliance:** 9

**Financial Stability:** 9

**Key Partners/Collaborations:** 8

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**Total Score:** 97.00

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**Reviewer Comments:** Angel View is a crucial resource for many individuals and families with special needs. This grant will allow them to expand their proven case management program to include east valley residents.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 95.3333333333333333333333333333 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 286 (3 of 3)

## Grant Scoring Review

**Reviewer:** Meghan Kane

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**Executive Summary:** 8

**Need and Alignment:** 8

**Goals:** 9

**Evaluation:** 8

**Organizational Capacity:** 8

**Organizational Sustainability:** 9

**Budget:** 9

**Percent of Funding Requested:** 9

**Fiduciary Compliance:** 9

**Financial Stability:** 9

**Key Partners/Collaborations:** 9

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**Total Score:** 95.00

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**Reviewer Comments:** When the District conducted focus groups in eastern Coachella Valley, participants consistently mentioned that there was a high need for resource awareness. Angel View targets this challenge by helping to educate and advocate for families and children suffering from medical conditions and by connecting families to support services. Angel View’s Strategic Plan is well thought out and executed. It highlights goals and corresponding strategies to meet those goals as well as mentioning challenges and how they will work to address those barriers. I recommend approval for the grant to support the work and future growth of Angel View.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 95.3333333333333333333333333333 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 286 (3 of 3)



## Grant Application Scoring Rubric

Category	Exceeds expectations <i>(7-10 points)</i>	Meets expectations <i>(3-6 points)</i>	Does not meet expectations <i>(0-2 points)</i>
<b>Executive Summary</b> (10 points)	The applicant <b>includes and effectively describes</b> the project’s mission and vision, the specific population the project will serve, the expected benefits to the community, the support for applicant’s project in the community with evidence based proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.	The applicant <b>includes and describes</b> the project’s mission and vision, the population the project will serve, the expected benefits to the community, the support for applicant’s project in the community with evidence based proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.	The applicant is unclear or does not <b>include or describe</b> the project’s mission and vision, the general population the project will serve, the expected benefits to the community, the support for applicant’s project in the community with proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.
<b>Need &amp; Alignment and Demonstrate</b> (10 points)	The applicant <b>explicitly defines a specific</b> need for the project within the identified community and <b>effectively describes</b> the alignment of that need to one of the Community Focus Areas of the District/Foundation’s Strategic Plan by using data, case studies, interviews, focus group results, media attention, etc.	The applicant <b>identifies</b> a need within the identified community for the project and <b>describes</b> the alignment of that need to one of the Community Focus Areas of the District/Foundation’s Strategic Plan by using data, case studies, interviews, focus group results, media attention, etc.	The applicant <b>does not clearly describe</b> a need for the project that its alignment to one of the Community Focus Areas of the District/Foundation’s Strategic Plan by using data, and/or case studies, and/or interviews/focus group results, and/or media attention, etc.
<b>Goals</b> (10 points)	The applicant has provided SMART goals with an evaluation plan that is <b>fully developed</b> . The <b>SMART</b> goals are <b>specific, measurable, ambitious, realistic and time-bound</b> , and the evaluation plan will <b>accurately</b> measure the project’s effectiveness.	The applicant has provided SMART goals with an evaluation plan. The <b>SMART</b> goals are <b>mostly specific, measurable, ambitious, realistic, and time-bound</b> , and the evaluation plan will measure <b>the aspects</b> of the project’s effectiveness.	The applicant has provided very limited goals and evaluation plan. The goals are not specific, measurable, timebound and will weakly measure the project’s effectiveness.

<p><b>Proposed Evaluation Plan</b> (10 points)</p>	<p>The applicant describes a <b>specific detailed plan of action for evaluation</b>, that includes both qualitative and quantitative assessment of the project that is well-defined with data reporting mechanisms and narrative that are clear and transparent. Evaluation is in alignment with Goals of the project.</p>	<p>The applicant describes a <b>plan of action for evaluation</b> that includes both qualitative and/or quantitative assessment of the project that is well-defined with data reporting mechanisms and /or narrative that are clear and transparent. Evaluation is in alignment with the Goals of the project.</p>	<p>The applicant <b>does not describe, or vaguely describes a reasonable plan of action</b> that can be completed during the grant period, involves some identified partners appropriately, and might make the project a reality.</p>
<p><b>% of Funding Requested – Leveraging of Outside Funds</b> (10 points)</p>	<p><b>0-50%</b> Budget shows mostly committed funds, in-kind funds for professional services and balance is from proposed funds have been identified and in place</p>	<p><b>51-70%</b> Budget shows some committed funds, in-kind funds for professional services and proposed funds making up the majority, have been identified.</p>	<p><b>71 - 100%</b> Budget shows limited to no committed funds, balance is made up of mostly identified proposed funds</p>
<p><b>Applicant Capacity and Infrastructure to Execute Proposal</b> (10 points)</p>	<p>The applicant includes concrete examples that <b>strongly demonstrate</b> that the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.)</p> <p>The <b>applicant strongly demonstrates</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support)</p>	<p>The applicant includes solid examples that <b>demonstrate</b> that the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.).</p> <p>The <b>applicant demonstrates</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support)</p>	<p>The applicant <b>does not include</b> examples that would demonstrate the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.).</p> <p>The <b>applicant is limited in its ability to demonstrate</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support).</p>

<b>Organizations Sustainability</b> (10 Points)	The applicant <b>strongly demonstrates that it</b> has a current strategic plan and/or business plan with measurable outcomes. Strong board engagement and governance. The proposed program is <b>identified within</b> the strategic plan.	The applicant <b>demonstrates</b> that it has a current strategic plan and/or business plan with measurable outcomes Shows Board engagement and governance. Applicant has clearly identified that the program is <b>supported by</b> the strategic plan	The applicant does not <b>demonstrate</b> that it has a strategic plan and/or business plan. The program only reflects the applicant’s mission.
<b>Budget</b> (10 points)	The budget is <b>specific</b> and <b>reasonable</b> , and all items <b>strongly align</b> with the described project. The budget <b>strongly demonstrates</b> financial clarity/value and tells the same story as the proposal narrative. There are no unexplained amounts. The overall value of the project (the relationship of benefits and/or participants) to costs is <b>effective</b> . Additional leveraged funding sources and in-kind services are included. Staff FTE is identified clearly. Budget includes \$XXX amounts and how these ties to staff time.	The budget is clear and <b>reasonable</b> , with the items <b>aligned</b> with the described project. There are no unexplained amounts. The overall value of the project (the relationship of benefits and/or participants to costs) is <b>reasonable</b> and/or <b>some</b> additional funding sources and/or in-kind services are included.	The budget is <b>not specific</b> and/or <b>reasonable</b> , and the items are <b>somewhat aligned</b> with the described project. The budget somewhat <b>demonstrates</b> financial clarity. There are no unexplained amounts.
<b>Fiduciary Compliance</b> (10 Points)	The applicant <b>strongly demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through unmodified audited financials 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 financials on a regular basis.	The applicant <b>demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through unmodified audited financials produced in a timely fashion, and the board reviews financials on a regular basis.	<b>The applicant demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through audited financials produced. A positive cash flow at the end of each fiscal year is not consistent. and the Board does not review financials on a regular basis.

<p><b>Financial Stability</b> (10 Points)</p>	<p>Funding sources for operations and programs are coming from multiple sources and is driven by a <b>strategic plan</b> for stability for both short- and long-term growth.</p>	<p>Source of funds for operations and programs are coming from multiple sources. There is a <b>limited plan</b> in place for stability for short term only.</p>	<p>Source of funds for operations and programs are coming from limited sources. There is <b>no plan</b> for stability in place currently.</p>
<p><b>Key Partners / Collaboration</b> (10 points)</p>	<p>The applicant <b>strongly demonstrates</b> solid partnerships and collaborative approach with letters of commitment or an MOU that includes a scope of work.</p>	<p>The applicant <b>demonstrates</b> partnerships and collaborative approach with letters of commitment.</p>	<p>The applicant <b>demonstrates</b> limited or no partnerships and has not included any letters of commitment.</p>
<p><b>Comments/Notes:</b></p>			

**Total Score:** \_\_\_\_ / 110 = \_\_\_\_ %

**Exceeds expectations:** 77% or Higher Fully Funded  
**Meets expectations:** 50%- 76% Full to Partial – Possible restrictions/conditions  
**Does not meet expectations:** 49% or Lower No funding to Partial funding with restrictions/conditions



**Date:** 1/22/20

**To:** Program Committee

**Subject:** Grant # 1036 Pueblo Unido CDC

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**Grant Request:** Fostering Healthy Communities

**Amount Requested:** \$50,000.00

**Project Period:** 2/10/2020 to 2/9/2021

**Project Description and Use of District Funds:** Pueblo Unido is requesting core operating support that will fund the organizational capacity to carry out our mission to improve the health and quality of life of low income residents of the ECV by improving access to safe drinking water and basic infrastructure. Our approach combines community organizing, education and technical assistance to promote healthy and sustainable communities. In our second year of operation, Pueblo Unido initiated a community-driven model that propels community-driven projects that build a healthful environment for families and children.

Pueblo Unido will continue to work with the Polanco communities to remedy interim and permanent solutions to supply safe and affordable drinking water. Through our experience we have identified two main approaches: 1) consolidation to a municipal service for cluster communities, which are multi-year projects that require long term investment; 2) decentralized systems to serve the most remote communities where municipal services are financially unfeasible.

Through this second approach, Pueblo Unido has been successful at implementing its Rural Infrastructure Program which focuses on installing point-of-use Reverse Osmosis water filtration system under the sink to remove arsenic and other contaminants found in water. To date the program has installed over 250 point-of-use Reverse Osmosis water filtration system, providing a great relief and wellness for over 2,000 low income residents.

**Strategic Plan Alignment:** Primary Care and Behavioral Health Access

**Geographic Area(s) Served:** Mecca



**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 \$50,000.00 be approved.
- Recommendation with modifications
- Deny



## **2019 Grant Request Summary**

### **Pueblo Unido CDC, Grant #1036**

#### **About the Organization**

Pueblo Unido CDC  
78150 Calle Tampico Suite 214  
La Quinta, CA 92253  
Tel:  
<http://www.pucdc.org>

**Organization Type:**  
501(c)(3)

#### **Primary Contact:**

Ramiro Aguilar  
Tel: (760) 777-7550  
[scarranza@pucdc.org](mailto:scarranza@pucdc.org)

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

#### **Proposal**

**Project Title:** Fostering Healthy Communities

**Total Project Budget:** \$1,000,000

**Requested Amount:** \$50,000

**Length of Project:** 1 months

**Start Date:** 2/10/2020

**End Date:** 2/10/2021

#### **Background:**

Background

Pueblo Unido is a tax-exempt non-profit organization that provides technical assistance in all aspects of project management, rehabilitation, and new design of affordable housing communities known as Polanco Mobile Home Parks. A Polanco Park consists of 6-12 mobile homes on undeveloped agriculture land without adequate access to safe drinking water, sanitary sewerage, and paved roads. Despite the social and economic inequities they face, these communities have a remarkable history, evidenced in their vibrant and resilient communities that dot the landscape of the ECV.

#### **Community Health Focus Area**

Primary Care and Behavioral Health Access

#### **Community Need:**

Pueblo Unido is requesting core operating support that will increase its capacity to advance organizational goals in several ways. First, core operating support would assist Pueblo Unido to carry out its mission to address the social, economic, health and environmental justice inequities experienced by the residents of the ECV and engage in collaborative efforts to find viable solutions to improve their health and quality of life. Second, funding will underwrite activities that build on our successful partnerships with other non-profit organizations, local and state agencies, elected officials, and continue to build local leadership to empower civic engagement and public policy advocacy.

Pueblo Unido's mission is to respond to the needs and challenges of ECV's underserved rural communities and create new opportunities to improve the quality of life. In alignment with DHCD mission to achieve optimal health for all district residents, Pueblo Unido works to create a new generation of socially-conscious and self-motivated leaders to engage civically and address the local health challenges arising from the environmental and public injustice.

A testimonial of how Pueblo Unido strives to advance wellness in underserved communities is the story of the Polanco MHP. A Polanco consists of 6-12 mobile homes on undeveloped agriculture land without adequate access to safe drinking water, sanitary sewerage, and paved roads. Despite the social and economic inequities they face, these communities have a remarkable history, evidenced in their vibrant and resilient communities that dot the landscape of the ECV. An estimated 15,000 residents live on these communities and depend on small water systems and septic systems that do not meet state requirements for water quality as they exceed the maximum contaminant levels of arsenic and fluoride. Pueblo Unido works with these communities and provide technical assistance to remedy interim and permanent solutions to supply safe and affordable drinking water.

Historically, the ECV has long endured a lack of critical infrastructure necessary to provide access to safe drinking water and sanitation for farmworker and low-income families. An estimated 15,000 residents in the ECV live in mobile home parks which are not served by municipal water and sanitation services. These 12-unit farmworker housing communities depend on small water systems, private domestic wells and septic systems that do not meet state requirements for water quality. These systems are usually permitted and tracked by the Riverside County Environmental Health Department and the Coachella Valley Water District, however, many communities are located in areas using water exceeding maximum contaminant levels of arsenic and fluoride. Exposure to arsenic in drinking water can pose severe environmental health hazards and can cause skin cancer, cancers of the bladder, lungs and kidney.

As such, these small water systems may not be able to remedy water quality problems on their own. Installing and maintaining a treatment system to address contamination is costly and out of their reach. Families that live on MHP's that are not consolidated to a municipal water system must drive an average of 15 miles to the nearest shopping center to buy bottled water. Consequently, families spend more than 10% of their earnings purchasing water for drinking and cooking. Similar challenges are also evident when managing onsite wastewater treatment systems. Soil conditions do not support effective use of septic systems with drain fields. Installation is challenging and expensive due to the high-water table and silty clay soils. Systems often fail, resulting in raw sewage discharges in the thousands of gallons.

### **Program Area**

Direct Services\Other

### **Project Description:**

Pueblo Unido is requesting core operating support that will fund the organizational capacity to carry out our mission to improve the health and quality of life of low income residents of the ECV by improving access to safe drinking water and basic infrastructure. Our approach combines community organizing, education and technical assistance to promote healthy and sustainable communities. In our second year of operation, Pueblo Unido initiated a community-driven model that propels community-driven projects that build a healthful environment for families and children.

Pueblo Unido will continue to work with the Polanco communities to remedy interim and permanent solutions to supply safe and affordable drinking water. Through our experience we

have identified two main approaches: 1) consolidation to a municipal service for cluster communities, which are multi-year projects that require long term investment; 2) decentralized systems to serve the most remote communities where municipal services are financially unfeasible.

Through this second approach, Pueblo Unido has been successful at implementing its Rural Infrastructure Program which focuses on installing point-of-use Reverse Osmosis water filtration system under the sink to remove arsenic and other contaminants found in water. To date the program has installed over 250 point-of-use Reverse Osmosis water filtration system, providing a great relief and wellness for over 2,000 low income residents.

**Proposed Program / Project Evaluation Plan**

Pueblo Unido uses both internal and external evaluation methods to assess its progress and impact. At the internal level, the executive director and Board of Directors evaluate organizational progress upon the completion of every project. Multi-year projects are evaluated quarterly and at the end of every fiscal year. Typically, the program manager or community coordinator will collect data before, during, and after a project. Once the data is collected, data is analyzed and interpreted to make changes and/or measure the project/program’s effectiveness. Depending on the strategic or action plan, every project will have benchmarks (indicators), standards, outcomes, processes, timeframes, and goals that are measured and assessed, typically through calendar grids. External evaluation methods include questionnaire surveys and qualitative measures such as observations and interviews to ensure programmatic goals and objectives are being met. To assess the organizations financial statements, Pueblo Unido contracts an external auditor team to assess the organizational financial capacity.

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> By December 2020, Pueblo Unido will install 30 under the sink reverse osmosis water filtration systems to provide drinkable water and of improved quality for an estimated 200 low-income residents of the Eastern Coachella Valley.</p>	<p><b>Evaluation #1:</b> Pueblo Unido will track the progress by hosting monthly meetings with staff members who typically oversee the program. This team includes Pueblo Unido’s; Project Manage, Outreach Coordinator, Water and Sanitation Specialist, Operations Coordinator, and Executive Director. Each staff member has key responsibilities that ensure the program’s goal are met. This program is evaluated by the executive director and operations coordinator who track the progress, purchase orders, parts, and labor cost when installing the new units. Pueblo Unido’s Water and Sanitation Specialist installs the units and provides water samples and testing. The Project Manager will coordinate any building and safety permits before installation of the units. Additionally, this staff directly works with the Riverside County Environmental Health Department to ensure water testing and results are met. The Outreach Coordinator will schedule installation, testing and is the point of contact and resource to the home residents.</p>
<p><b>Goal #2:</b> By December 2020, Pueblo Unido will improve the quality of life and health of an estimated 200 low-income residents of the Eastern Coachella Valley by providing access to</p>	<p><b>Evaluation #2:</b> Pueblo Unido will track the progress by installing 30 under the sink reverse osmosis water filtration systems. To ensure that the quality of life and health of residents has</p>

<p>water safe for drinking and cooking.</p>	<p>improved, Pueblo Unido will conduct water samples, and testing that will ensure the provided water is safe to drink and its improved quality and arsenic free. After each system is installed, water will undergo testing, to then approved by local agencies. Pueblo Unido's outreach coordinator will conduct surveys to each home where the systems will be installed.</p>
<p><b>Goal #3:</b> By December 2020, Pueblo Unido will provide environmental and public health training and education resources to at least 400 low-income residents of mobile home parks communities of the Eastern Coachella Valley.</p>	<p><b>Evaluation #3:</b> Evidence by one health fair, eight community meetings, and three capacity building training workshops Pueblo Unido will track the progress by quantify data gather during the events. During every event and meeting Pueblo Unido will have sign-in sheets that will measure attendees. Qualitative data such as pre and post training interviews and surveys will also be implemented to ensure training topics and workshops are catered to community's needs. To ensure the goal is being met, Pueblo Unido will continue to schedule community monthly meetings and its annual health resource fair during the spring. Capacity building workshops will be schedule during the 1st, 2nd and 4th quarter in calendar year 2020.</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>

**Participants:**

**Population Served**

Adults (25-64 years old)

**Geographical Area Served**

Mecca;North Shore;Oasis;Thermal

**Age Group**

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

**Number Served Per Age Group**

- 0-5:** 20
- 6-17:** 20
- 18-24:** 20
- 25-64:** 20
- 65 or more:** 20
- Total:**

**Participant Community**

Located in Riverside County, the ECV includes the City of Coachella and the unincorporated communities of Thermal, Oasis, Mecca and North Shore. Primarily rural, the region is driven by

an agricultural economic engine that represents an economic impact of over \$2 billion. The population of approximately 60,000 residents is predominantly Spanish Monolingual Latinos and made up of low-income farmworkers. Among the many challenges confronting this underserved and exploitable population are a lack of affordable housing options, lack of public transportation, access to healthy foods, abysmal working conditions, and the lack of critical infrastructure to supply safe and clean drinking water.

### **Organizational Capacity and Sustainability**

#### **Organizational Capacity**

Pueblo Unido's staff and the Board of Directors have a long history of leadership in resolving the most challenging issues impacting the lives of farm workers and low-income families. During the past decade, this has resulted in road safety improvement, planning and development of sewer collection systems, development of affordable housing, and the extension of the domestic water supply to include mobile home park residents in the ECV.

Pueblo Unido staff are drawn from the communities that Pueblo Unido serves and thus reflect their diversity. Current staff represent a new generation of leaders whose parents continue working in the ECV's agricultural fields, live in disadvantaged communities or have direct cultural or family ties to the communities we serve. The following list highlight Pueblo Unido's organizational capacity, all of whom are full time paid staff;

- Executive Director
- Operations Coordinator
- Project Manager
- Administrative Assistant
- Community Outreach Coordinator
- On-Site Property Maintenance
- Water and Sanitation Specialist
- Grant Writer

Pueblo Unido's management structure is formed by our executive director and a group of six dedicated volunteer board members. Pueblo Unido partners with professionals under contract agreements in the fields of accounting, engineering, architectural design, and legal services.

#### **Organizational Sustainability:**

In 2008 Pueblo Unido CDC started with a vision of greater opportunities for farmworkers and a \$250 donation from Founder and current Executive Director, Sergio Carranza. Pueblo Unido's funding model is to gain general operations grants from foundations and sub-contract awards to fund the day-to-day operations of the organization. This funding allows Pueblo Unido's dedicated team to attract and secure larger government grants. These government grants become a direct investment towards the development of our rural communities. Combined, this funding supports Pueblo Unido's programs and the staff time needed to implement them. Today, for every \$1 secured through sub-contract awards and foundation grants, a total of \$17 has been acquired in direct community investment from government grants. Since 2010, Pueblo Unido has leveraged over \$15 million dollars in the organization's core areas.

Pueblo Unido recognizes that funding sources must be diversified, therefore other fundraising development activities are being implemented to strengthen our operations in addition to the above. Pueblo Unido has two annual fundraising events. The Michael Rosenfeld Children Development Fund and La Fiesta del Pueblo which are aimed toward supporting Pueblo Unido's mission and general operations to continue building healthy and sustainable communities in the ECV.

## **Partnerships:**

### **Key Partners:**

Pueblo Unido works in collaboration with other non-profit organizations, state and federal entities, the local water district, and Riverside County's elected officials to raise public awareness about the environmental, public health and economic conditions affecting the quality of life of local communities and to identify solutions that will reduce barriers, increase opportunity, and allow residents to have access to essential health services. Strategic cross-sector partnerships have increased our impact and have already led to transformational victories in the ECV.

Three important collaborations illustrate Pueblo Unido's approach.

First, Pueblo Unido has built a strong working relationship with the Coachella Valley Water District. This institution holds the political power and technical capacity necessary to respond to the infrastructure needs identified by the community. Pueblo Unido is a member of CVWD's Disadvantaged Communities Infrastructure Committee (DACIC), a cross-sector collaboration whose goal is to secure access to safe affordable drinking water, wastewater, and flood control services in the ECV. The committee is developing an Infrastructure Development Plan that addresses the infrastructure gaps in ECV.

Second, Pueblo Unido is an organizational partner in Alianza CV. Alianza is the only alliance in the ECV bringing together community members, nonprofits, and government officials to lead efforts that we need for a thriving region. Our goal at Alianza, is to transform the socio-economic conditions of the ECV so that people in our communities have opportunities to prosper.

Third, Pueblo Unido is an active member of the Housing Review Committee Advisory Council for the unincorporated area of the Coachella Valley. The advisory council was established by the Riverside County Board of Supervisors in 2002 and receives and reviews complaints concerning the county's mobile home park community and employee housing enforcement program. Pueblo Unido's leads efforts in the Resource, Process and Outreach subcommittees to leverage resources, engage community, and provides recommendation.

## Line Item Budget

## Operational Costs

PROGRAM OPERATIONS		Total Program/Project Budget	Funds from Other Sources <i>Detail on sheet 3</i>	Amount Requested from DHCD
<b>Total Staffing Costs</b> <i>Detail on sheet 2</i>		\$470,000.00	\$420,000.00	\$50,000.00
<b>Equipment (itemize)</b>				
1	Equipment and Supplies	\$30,000.00	\$30,000.00	\$0.00
2	Professional Fees	\$150,000.00	\$150,000.00	\$0.00
3	Conferences	\$1,500.00	\$1,500.00	\$0.00
4	Meals & Ent	\$3,000.00	\$3,000.00	\$0.00
5	Project Development	\$75,000.00	\$75,000.00	\$0.00
6	San Jose Center	\$18,400.00	\$18,400.00	\$0.00
<b>Supplies (itemize)</b>				
1	Equipment & Furniture	\$3,000.00	\$3,000.00	\$0.00
2	Office Supplies	\$3,000.00	\$3,000.00	\$0.00
3	Misc. Expenses	\$2,000.00	\$2,000.00	\$0.00
4	Contract services	\$38,600.00	\$38,600.00	\$0.00
<b>Printing/Duplication</b>		\$3,000.00	\$3,000.00	\$0.00
<b>Mailing/Postage</b>		\$600.00	\$600.00	\$0.00
<b>Travel/Mileage</b>		\$20,000.00	\$20,000.00	\$0.00
<b>Education/Training</b>		\$2,000.00	\$2,000.00	\$0.00
<b>Office/Rent/Mortgage</b>		\$18,000.00	\$18,000.00	\$0.00
<b>Telephone/Fax/Internet</b>		\$4,200.00	\$4,200.00	\$0.00
<b>Utilities</b>		\$3,200.00	\$3,200.00	\$0.00
<b>Insurance</b>		\$6,500.00	\$6,500.00	\$0.00
<b>Other facility costs not described above (itemize)</b>				
1	Janitorial services	\$6,000.00	\$6,000.00	\$0.00
2	Fundraising	\$8,000.00	\$8,000.00	\$0.00
3	Operations Reserve Fund	\$50,000.00	\$50,000.00	\$0.00
4			\$0.00	\$0.00
<b>Other program costs not described above (itemize)</b>				
1	Meeting Cost	\$2,000.00	\$2,000.00	\$0.00
2	Line of Credit	\$45,000.00	\$45,000.00	\$0.00
3	Capacity Building	\$2,500.00	\$2,500.00	\$0.00
4	Repairs and Maintenance	\$50,000.00	\$50,000.00	\$0.00
<b>Total Program Budget</b>		<b>\$1,015,500.00</b>	<b>\$965,500.00</b>	<b>\$50,000.00</b>

### 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	Executive Director	\$ 71,400.00	50%		\$10,000.00
2	Operations Coordinator	\$ 51,000.00	50%		\$10,000.00
3	Project Manager	\$ 50,000.00	100%		\$10,000.00
4	Outreach Coordinator	\$ 42,000.00	100%		\$10,000.00
5	Water and Sanitation Specialist	\$ 38,000.00	100%		\$10,000.00
6	Maintenance	\$ 28,000.00	50%		
7	Administrative Assistant	\$ 31,000.00	50%		
8	Grant Writer	\$ 51,000.00	50%		
<b>Total Employee Benefits</b>		\$ 108,000.00	at 30%		
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt;</b>	<b>\$50,000.00</b>
<b>Budget Narrative</b>	<p style="color: red;">Executive Director- Founder of the organization dedicates his position to oversee the finances and operations of the organization. Operations Coordinator- Executive director assistant and ensures the operations and day to day activities of the organization are scheduled. Project Manager- Coordinates dibbing, permitting, construction and inspections of all infrastructure and housing projects. Outreach Coordinator- Coordinates community meetings. Water and Sanitation Specialist- Maintains, installs, and inspects water filtration systems at Mobile Home Park. Maintenance- this staff maintains a 75 mobile home park, (maintenance duties vary). Administrative Assistance- Assist the operation coordinator and performs property management activities. Grant Writer- Grant writing and funding development.</p>				
<b>Budget Narrative</b>	<p style="color: red;">Health insurance (health, dental, vision) and 401 3b retirement package.</p>				
Professional Services / Consultants		Hourly Rate	Hours/Week	Monthly Fee	Fees Paid by DHCD Grant
<b>Company and Staff Title</b>					
1	Accounting Fees			\$1,416.00	
2	Professional /legal Fees			\$420.00	
3	Marketing and Web			\$250.00	
4	IS/IT			\$416.00	
5	Payroll Fees			\$208.00	
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt;</b>	<b>\$0.00</b>
<b>Budget Narrative</b>	<p style="color: red;">Accounting- Book keeping and financial accounting. Professional and Legal Fees- Marketing and Website- Website maintenance and marketing. IS/TI- Interconnect Networks. Payroll Fees- payroll fees.</p>				



**Line Item Budget**

**Other**

**Program Funds**

<b>Other funding received (actual or projected) SPECIFIC to this program/project</b>		<b>Amount</b>
<b>Fees</b>		
<b>Donations</b>		
<b>Grants (List Organizations)</b>		
1	The Weingart Foundation	\$75,000.00
2	The California Endowment	\$110,000.00
3	Wells Fargo Bank	\$22,700.00
4	Andersons Children Foundation	\$22,900.00
5	Pacific Western Bank	\$10,000.00
6	Cal EPA	\$45,030.00
7	Catholic Campaign for Human Dev.	\$55,000.00
8	Common Counsel Foundation	\$50,000.00
9	Union Pacific Foundation	\$10,000.00
10	Rabobank Foundation	\$15,000.00
11	Rural Communities Assistance Corporation	\$78,000.00
12	SWRCB	\$495,569.00
13	SWRCB	\$10,000.00
14		
<b>Fundraising (describe nature of fundraiser)</b>		
1	<b>The Michael Rosenfeld Children's Fundraiser</b>	\$15,000.00
2	<b>Fiesta del Pueblo</b>	\$5,000.00
<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>\$1,019,199.00</b>
<b>Budget Narrative</b>	Income is actual from last year (2019). Grants from State Water Resource Control Board are multi year and on a reimbursement base, future years will vary.	

## Grant Scoring Review

**Reviewer:** Donna Craig

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**Executive Summary:** 10

**Need and Alignment:** 10

**Goals:** 8

**Evaluation:** 8

**Organizational Capacity:** 9

**Organizational Sustainability:** 9

**Budget:** 9

**Percent of Funding Requested:** 10

**Fiduciary Compliance:** 9

**Financial Stability:** 9

**Key Partners/Collaborations:** 10

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**Total Score:** 101.00

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**Reviewer Comments:** Pueblo Unido is one of few organizations that champion for the vulnerable and basically ignored underserved residents in the Eastern Coachella Valley. Through a dynamic approach of community organizing, and education and technical assistance to promote healthy and sustainable communities allows Pueblo Unido to create a unique funding model that for every \$1 secured through sub-contract awards and foundation grant, a total of \$17 has been acquired in direct community investment from government grants.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 101.6666666666666666666666666667 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 305 (3 of 3)

## Grant Scoring Review

**Reviewer:** Alejandro Espinoza

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**Executive Summary:** 9

**Need and Alignment:** 9

**Goals:** 10

**Evaluation:** 9

**Organizational Capacity:** 9

**Organizational Sustainability:** 8

**Budget:** 9

**Percent of Funding Requested:** 9

**Fiduciary Compliance:** 9

**Financial Stability:** 9

**Key Partners/Collaborations:** 10

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**Total Score:** 100.00

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**Reviewer Comments:** Pueblo Unido has a proven track record of advocating for and organizing disadvantaged community members of the eastern Coachella Valley residing in trailer parks. They have been working diligently with local and regional partners to address disparities in infrastructure and environmental health issues, like access to clean and reliable water sources. This grant will allow them to continue their work in the eastern Coachella Valley and expand their current efforts to address disparities focused on short, intermediate, and long term solutions.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 101.6666666666666666666666666667 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 305 (3 of 3)

## Grant Scoring Review

**Reviewer:** Meghan Kane

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**Executive Summary:** 9

**Need and Alignment:** 9

**Goals:** 10

**Evaluation:** 8

**Organizational Capacity:** 10

**Organizational Sustainability:** 9

**Budget:** 9

**Percent of Funding Requested:** 10

**Fiduciary Compliance:** 10

**Financial Stability:** 10

**Key Partners/Collaborations:** 10

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**Total Score:** 104.00

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**Reviewer Comments:** Pueblo Unido is an organization that is forward thinking and strives to provide immediate action to families struggling to receive a basic necessity, safe water. Providing filtration systems so families can receive clean, safe water to their homes has short-term and long-term benefits from reducing stress, reducing the financial burden of constantly purchasing water for cooking and drinking, and mitigating long term health impacts. Additionally, Pueblo Unido advocates and engages residents of Polanco communities to address and impact public policy for the investment in critical infrastructure. Pueblo Unido understands the time and effort it takes to bring the partnerships and finances for infrastructure improvements and developments; therefore, part of their Strategic Plan is to focus on what they can do right now and that is the filtration systems. I recommend this grant request for approval as it directly relates to our mission to achieve optimal health for all district residents.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 101.6666666666666666666666666667 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 305 (3 of 3)



## Grant Application Scoring Rubric

Category	Exceeds expectations <i>(7-10 points)</i>	Meets expectations <i>(3-6 points)</i>	Does not meet expectations <i>(0-2 points)</i>
<b>Executive Summary</b> (10 points)	The applicant <b>includes and effectively describes</b> the project’s mission and vision, the specific population the project will serve, the expected benefits to the community, the support for applicant’s project in the community with evidence based proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.	The applicant <b>includes and describes</b> the project’s mission and vision, the population the project will serve, the expected benefits to the community, the support for applicant’s project in the community with evidence based proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.	The applicant is unclear or does not <b>include or describe</b> the project’s mission and vision, the general population the project will serve, the expected benefits to the community, the support for applicant’s project in the community with proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.
<b>Need &amp; Alignment and Demonstrate</b> (10 points)	The applicant <b>explicitly defines a specific</b> need for the project within the identified community and <b>effectively describes</b> the alignment of that need to one of the Community Focus Areas of the District/Foundation’s Strategic Plan by using data, case studies, interviews, focus group results, media attention, etc.	The applicant <b>identifies</b> a need within the identified community for the project and <b>describes</b> the alignment of that need to one of the Community Focus Areas of the District/Foundation’s Strategic Plan by using data, case studies, interviews, focus group results, media attention, etc.	The applicant <b>does not clearly describe</b> a need for the project that its alignment to one of the Community Focus Areas of the District/Foundation’s Strategic Plan by using data, and/or case studies, and/or interviews/focus group results, and/or media attention, etc.
<b>Goals</b> (10 points)	The applicant has provided SMART goals with an evaluation plan that is <b>fully developed</b> . The <b>SMART</b> goals are <b>specific, measurable, ambitious, realistic and time-bound</b> , and the evaluation plan will <b>accurately</b> measure the project’s effectiveness.	The applicant has provided SMART goals with an evaluation plan. The <b>SMART</b> goals are <b>mostly specific, measurable, ambitious, realistic, and time-bound</b> , and the evaluation plan will measure <b>the aspects</b> of the project’s effectiveness.	The applicant has provided very limited goals and evaluation plan. The goals are not specific, measurable, timebound and will weakly measure the project’s effectiveness.

<p><b>Proposed Evaluation Plan</b> (10 points)</p>	<p>The applicant describes a <b>specific detailed plan of action for</b> evaluation, that includes both qualitative and quantitative assessment of the project that is well-defined with data reporting mechanisms and narrative that are clear and transparent. Evaluation is in alignment with Goals of the project.</p>	<p>The applicant describes a <b>plan of action for evaluation</b> that includes both qualitative and/or quantitative assessment of the project that is well-defined with data reporting mechanisms and /or narrative that are clear and transparent. Evaluation is in alignment with the Goals of the project.</p>	<p>The applicant <b>does not describe, or vaguely describes a reasonable plan of action</b> that can be completed during the grant period, involves some identified partners appropriately, and might make the project a reality.</p>
<p><b>% of Funding Requested – Leveraging of Outside Funds</b> (10 points)</p>	<p><b>0-50%</b> Budget shows mostly committed funds, in-kind funds for professional services and balance is from proposed funds have been identified and in place</p>	<p><b>51-70%</b> Budget shows some committed funds, in-kind funds for professional services and proposed funds making up the majority, have been identified.</p>	<p><b>71 - 100%</b> Budget shows limited to no committed funds, balance is made up of mostly identified proposed funds</p>
<p><b>Applicant Capacity and Infrastructure to Execute Proposal</b> (10 points)</p>	<p>The applicant includes concrete examples that <b>strongly demonstrate</b> that the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.)</p> <p>The <b>applicant strongly demonstrates</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support)</p>	<p>The applicant includes solid examples that <b>demonstrate</b> that the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.).</p> <p>The <b>applicant demonstrates</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support)</p>	<p>The applicant <b>does not include</b> examples that would demonstrate the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.).</p> <p>The <b>applicant is limited in its ability to demonstrate</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support).</p>

<p><b>Organizations Sustainability</b> (10 Points)</p>	<p>The applicant <b>strongly demonstrates that it</b> has a current strategic plan and/or business plan with measurable outcomes. Strong board engagement and governance. The proposed program is <b>identified within</b> the strategic plan.</p>	<p>The applicant <b>demonstrates</b> that it has a current strategic plan and/or business plan with measurable outcomes Shows Board engagement and governance. Applicant has clearly identified that the program is <b>supported by</b> the strategic plan</p>	<p>The applicant does not <b>demonstrate</b> that it has a strategic plan and/or business plan. The program only reflects the applicant’s mission.</p>
<p><b>Budget</b> (10 points)</p>	<p>The budget is <b>specific</b> and <b>reasonable</b>, and all items <b>strongly align</b> with the described project. The budget <b>strongly demonstrates</b> financial clarity/value and tells the same story as the proposal narrative. There are no unexplained amounts. The overall value of the project (the relationship of benefits and/or participants) to costs is <b>effective</b>. Additional leveraged funding sources and in-kind services are included. Staff FTE is identified clearly. Budget includes \$XXX amounts and how these ties to staff time.</p>	<p>The budget is clear and <b>reasonable</b>, with the items <b>aligned</b> with the described project. There are no unexplained amounts. The overall value of the project (the relationship of benefits and/or participants to costs) is <b>reasonable</b> and/or <b>some</b> additional funding sources and/or in-kind services are included.</p>	<p>The budget is <b>not specific</b> and/or <b>reasonable</b>, and the items are <b>somewhat aligned</b> with the described project. The budget somewhat <b>demonstrates</b> financial clarity. There are no unexplained amounts.</p>
<p><b>Fiduciary Compliance</b> (10 Points)</p>	<p>The applicant <b>strongly demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through unmodified audited financials 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 financials on a regular basis.</p>	<p>The applicant <b>demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through unmodified audited financials produced in a timely fashion, and the board reviews financials on a regular basis.</p>	<p><b>The applicant demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through audited financials produced. A positive cash flow at the end of each fiscal year is not consistent. and the Board does not review financials on a regular basis.</p>

<p><b>Financial Stability</b> (10 Points)</p>	<p>Funding sources for operations and programs are coming from multiple sources and is driven by a <b>strategic plan</b> for stability for both short- and long-term growth.</p>	<p>Source of funds for operations and programs are coming from multiple sources. There is a <b>limited plan</b> in place for stability for short term only.</p>	<p>Source of funds for operations and programs are coming from limited sources. There is <b>no plan</b> for stability in place currently.</p>
<p><b>Key Partners / Collaboration</b> (10 points)</p>	<p>The applicant <b>strongly demonstrates</b> solid partnerships and collaborative approach with letters of commitment or an MOU that includes a scope of work.</p>	<p>The applicant <b>demonstrates</b> partnerships and collaborative approach with letters of commitment.</p>	<p>The applicant <b>demonstrates</b> limited or no partnerships and has not included any letters of commitment.</p>
<p><b>Comments/Notes:</b></p>			

**Total Score:** \_\_\_\_ / 110 = \_\_\_\_%

**Exceeds expectations:** 77% or Higher Fully Funded  
**Meets expectations:** 50%- 76% Full to Partial – Possible restrictions/conditions  
**Does not meet expectations:** 49% or Lower No funding to Partial funding with restrictions/conditions





**Date:** 1/22/20

**To:** Program Committee

**Subject:** Grant # 1038 Coachella Valley Volunteers in Medicine

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**Grant Request:** Affordable and Accessible Healthcare Services For East Valley Residents

**Amount Requested:** \$50,000.00

**Project Period:** 2/1/2020 to 1/31/2021

**Project Description and Use of District Funds:** Patients will receive culturally competent, medical and dental care services from licensed professionals for primary care and limited specialty services (Neurology, Dermatology, Ophthalmology and Podiatry) Patients will also receive no-charge laboratory testing and imaging services (Ultrasounds, MRIs, CT Scans, X-rays), as ordered by their physician, when necessary for their diagnosis and treatment. Depending upon need, patients may also be referred to, or provided with, other supportive services such as Health Education and Wellness classes, General Medical and Diabetes Case Management, Social Needs Assessment and Community Referral/Follow-up/Tracking, and, Health Navigator services. (CVVIM also provides homeless medical outreach services, however the focus of this grant request is not specifically to that population though a minimal number may also be served.) District funds would only be used to support staffing costs for 1) direct patient care staff, 2) clinical supplies and 3) care delivery costs related to the provision of medical and dental care.

Grant funding will only be used to support staff positions with DIRECT responsibilities for patient care - reception, scheduling, intake/eligibility (Front Office coordinator), medical assisting (Medical Assistant), and case management (DM Case Manager). For these three positions, we are requesting 37.5% of total salaries, or 50% of the 75% allocated to Program.

Funding will also support routine clinical supplies (i.e. gloves, wound and gynecological supplies, syringes) and patient care delivery costs (i.e. labs, diagnostic and imaging). We are requesting 37.5% of budgeted costs, or 50% of the 75% allocated to the Program.

**Strategic Plan Alignment:** Primary Care and Behavioral Health Access

**Geographic Area(s) Served:** Coachella



**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 \$50,000.00 be approved.
- Recommendation with modifications
- Deny

## 2019 Grant Request Summary

### Coachella Valley Volunteers in Medicine, Grant #1038

#### About the Organization

Coachella Valley Volunteers in Medicine  
 PO Box 10090  
 82-915 Avenue 48  
 Indio, CA 92202  
 Tel: 760 342 4414 Ext: 103  
<http://cvvim.org>

#### **Organization Type:**

501(c)(3) \Medical

#### **Primary Contact:**

Marie J. Brunner  
 Tel: (760) 625-0763  
 Fax: (760) 837-9065  
[marie.brunner@cvvim.org](mailto:marie.brunner@cvvim.org)

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

Grant Year	Project Title	Grant Amount	Type	Disposition Date	Fund
2011	Capacity Building 2012	\$103,857	Achievement Building	5/22/2012	Grant budget
2012	Core Operating Support	\$125,224	Grant	6/25/2013	Grant budget
2014	CVVIM's Evolution in the Era of Affordable Care Act	\$112,924	Grant	9/23/2014	Grant budget
2015	Providing continued access to healthcare post implementation of the Affordable Care Act.	\$120,798	Grant	5/24/2016	Grant budget
2017	Primary healthcare and support services to District residents	\$121,500	Grant	9/26/2017	Grant budget
2018	Improving Community Health Through Affordable & Accessible Healthcare Services	\$121,500	Grant	3/26/2019	

#### **Proposal**

**Project Title:** Affordable and Accessible Healthcare Services For East Valley Residents

**Total Project Budget:** \$1,062,898

**Requested Amount:** \$50,000

**Length of Project:** 12 months

**Start Date:** 2/1/2020

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

#### **Background:**

Background

Incorporated in 2008 to provide no-charge healthcare services to low-income and uninsured adult, Valley residents, CVVIM utilizes a volunteer driven model of service delivery. Annually,

an average of 200+ volunteers donate in excess of 14,000 hours, valued at more than \$300,000, to fulfill our mission.

Annually, an average of 1,000 unique patients are provided an average of 3,200 visits with a physician or dentist, and more than 1,000 other contacts are provided for health education, case management, health navigator services, homeless medical outreach and community/social service referrals. Since inception, more than 32,000 visits have been provided.

### **Community Health Focus Area**

Primary Care and Behavioral Health Access

### **Community Need:**

As reported in the 2016 Coachella Valley Community Health Survey (February 2017. HARC.) there are 30,000 uninsured adults living in the Coachella Valley, most of whom have incomes below the Federal Poverty Level. CVVIM will provide access to many of these individuals for affordable (no-charge) healthcare services from our Indio clinic and outreach services (Homeless Medical Outreach). Eligible patients will be residents of Coachella Valley who are at no more than 200% of Federal Poverty Level, and who are uninsured or underinsured. Patients will receive culturally sensitive medical and dental care services from licensed professionals for primary care and limited specialty services. Patients will also receive no-charge laboratory testing and imaging services (Ultrasounds, MRIs, CT Scans, X-rays), as ordered by their physician, when necessary for their diagnosis and treatment.

Depending upon need, patients may be referred to or provided with other supportive services such as Health Education and Wellness classes, General Medical and Diabetes Case Management, Social Needs Assessment and Community Referral (and follow-up/tracking) and, Health Navigator services. Medical services for homeless persons are also provided from outreach teams through our weekly Street Medicine program.

District funds would be used to support staffing costs for identified patient care staff, clinical supplies and care delivery costs related to the provision of care (one-to-one visits; case management; education; homeless outreach services) for 350 contacts with approximately 120 qualified east Valley residents, aligning the program with the District's Community Focus Area of Primary Care Access, as well as, to Homelessness and, Healthy Eating, Active Living, while providing services in an accountable manner.

As reported in the 2016 Coachella Valley Community Health Survey (February 2017. HARC.) there are 30,000 uninsured adults living in the Coachella Valley, most of whom have incomes below the Federal Poverty Level.

CVVIM will provide access to many of these individuals for affordable (no-charge) healthcare services from our Indio clinic. This project aligns itself to the DHCD Strategic Plan Community Focus Area of Primary Care Access through the planned provision of the above services.

### **Program Area**

Direct Services\Medical/Dental; Direct Services\Other

### **Project Description:**

Patients will receive culturally competent, medical and dental care services from licensed professionals for primary care and limited specialty services (Neurology, Dermatology, Ophthalmology and Podiatry) Patients will also receive no-charge laboratory testing and imaging services (Ultrasounds, MRIs, CT Scans, X-rays), as ordered by their physician, when necessary for their diagnosis and treatment. Depending upon need, patients may also be referred to, or provided with, other supportive services such as Health Education and Wellness

classes, General Medical and Diabetes Case Management, Social Needs Assessment and Community Referral/Follow-up/Tracking, and, Health Navigator services. (CVVIM also provides homeless medical outreach services, however the focus of this grant request is not specifically to that population though a minimal number may also be served.) District funds would only be used to support staffing costs for 1) direct patient care staff, 2) clinical supplies and 3) care delivery costs related to the provision of medical and dental care.

Grant funding will only be used to support staff positions with DIRECT responsibilities for patient care - reception, scheduling, intake/eligibility (Front Office coordinator), medical assisting (Medical Assistant), and case management (DM Case Manager). For these three positions, we are requesting 37.5% of total salaries, or 50% of the 75% allocated to Program.

Funding will also support routine clinical supplies (i.e. gloves, wound and gynecological supplies, syringes) and patient care delivery costs (i.e. labs, diagnostic and imaging). We are requesting 37.5% of budgeted costs, or 50% of the 75% allocated to the Program.

**Proposed Program / Project Evaluation Plan**

CVVIM is committed to providing quality healthcare services to our patients. We have processes in place for both quantitative and qualitative evaluation, focusing on both patients and volunteers.

Quantitative evaluation is an ongoing process whereby each patient is tracked over their lifetime with CVVIM, both to the number of individual face-to-face "visits" for either medical or dental care scheduled and received, as well as for numbers of other "contacts" such as medical case management, diabetes and other disease-specific case management, health education and wellness services, health navigator services, homeless medical outreach services and social assessments resulting in social service/community referrals. In particular, numbers for "visits" are monitored monthly to ensure we are on target to maintain, and ideally increase, our annual average number of patient visits at around 3,000 per year. Encounters are tracked primarily for supplemental reporting on additional services provided that are not medical or dental visits.

We also track the number of volunteers by service type (i.e. physician, dentist, medical assistant, clerical volunteer, etc.) and use Department of Labor Wage and Labor information to determine the value of their donated professional service. The value of all donated services is calculated monthly and ultimately is budgeted and accounted for in our annual and monthly budgets.

Qualitatively, volunteers are evaluated annually for their level of satisfaction, or at the time of their resignation from volunteer service. Patients are evaluated biannually through a random sampling of patients while at the clinic and also for patients who have not been into the clinic for six months or more. Questions are focused on both their personal satisfaction with services received as well as to healthcare services they would like, or needed, that are not offered.

Information from all surveys is reviewed by program committees and the Board of Directors.

**Program/Project Goals and Evaluation**

<p><b>Goal #1:</b> Provide healthcare services to 600 low-income and uninsured adults residing in the eastern Coachella Valley over a twelve-month period.</p>	<p><b>Evaluation #1:</b> Demographic and service delivery information will be entered into an electronic health record over the period of the grant and ongoing. Patients will be tracked monthly and ongoing for quantitative outcomes related to the numbers of medical or dental visits with a licensed healthcare provider. Monthly</p>
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	reports will be reviewed by staff to monitor and track progress towards our stated goal, and reports will be presented for review and discussion to the CVVIM Clinical Care Committee and the Board of Directors, and in requested grant reports.
<b>Goal #2:</b> A random sampling of patients will be completed biannually to determine patient satisfaction and solicit information on unmet healthcare needs.	<b>Evaluation #2:</b> For each survey (2), both patients who have received services in the most recent six-month period, and those who have not received services and who remain eligible for services, will be contacted, in-person or on the phone, for inclusion in the survey. A minimum 10% response rate of total patients seen during the period will be sought. Surveys will be reviewed and a summary report will be completed by staff and presented to the Clinical Care Committee for review and discussion. Any negative trends or issues identified through the surveys will be dealt with immediately by staff and reported to the Board of Directors with the resultant action taken. Information obtained from the surveys will be included in any discussion by the Board of Directors when reviewing the Strategic Plan, with appropriate actions taken/planned for.
<b>Goal #3:</b> Volunteers will be surveyed annually and at the time of their resignation from service to determine their level of satisfaction with their volunteer service.	<b>Evaluation #3:</b> A survey template designed by HARC in 2016 will be used to survey volunteers; the survey may be updated to include specific questions relating to any issues identified during the year that negatively or positively was determined to impact their service. Results from the survey will be reviewed by staff and a report will be prepared for review and discussion by the Board of Directors, immediately in the event of any negative issues, or annually at the regular meeting of the Board of Directors when reviewing the Strategic Plan, with appropriate actions taken/planned for.
<b>Goal #4:</b>	<b>Evaluation #4:</b>
<b>Goal #5:</b>	<b>Evaluation #5:</b>

**Participants:**

**Population Served**

Adults (25-64 years old)

**Geographical Area Served**

Coachella; Indian Wells; Indio; La Quinta; Mecca; North Shore; Oasis; Palm Desert; Thermal

**Age Group**

- (18-24) Youth
- (25-64) Adults
- (65+) Seniors

### **Number Served Per Age Group**

**0-5:** 0

**6-17:** 0

**18-24:** 100

**25-64:** 800

**65 or more:** 100

**Total:**

### **Participant Community**

District residents served by this project are adults who 1) reside in the eastern Coachella Valley, 2) have a household income not more than 200% of Federal Poverty Level Guidelines, and, 3) are uninsured or underinsured.

Verification of eligibility requirements is required at intake and annually thereafter.

### **Organizational Capacity and Sustainability**

#### **Organizational Capacity**

All staff are allocated to patient care indirectly, however there are four positions with direct patient care responsibilities. Our Front Office Coordinator (FT) is responsible for patient reception, scheduling, medical and community referrals, and medical records, as well as supervision of front office volunteers. Our Clinical Services Coordinator (FT) assists medical providers and ensures timely patient flow between the front and back offices, as well as maintaining adequate routine medical supplies, providing general case management, conducting health education, and supervising clinical volunteers. Our Dental Assistant (PT) is responsible for assisting dental providers with oral care, taking x-rays, ordering supplies and equipment sterilization and storage. We anticipate 75% of staff time for these positions will be spent on patients from the eastern Valley, as requested in the grant budget.

These staff are all supervised by our Clinical Operations Director (FT) who also has responsibility for privileging licensed providers and maintaining related documentation, scheduling providers, ensures patient satisfaction is maintained, assists with patient advocacy, and other administrative tasks. No grant support is requested for this position, nor for other positions in the organization (Event Manager and Executive Director).

#### **Organizational Sustainability:**

Providing healthcare services to low-income, uninsured adult residents of the Coachella Valley is the mission of CVVIM, and therefore, everything we do relates to these services. As such, all of our services are continually monitored and reviewed by staff, various committees and ultimately our Board of Directors.

This year, as part of our Strategic Planning process, our Board of Directors established Values for the organization, the first Value being: Patients come first. It was overwhelmingly understood that everything we undertake is because of the patients we see, or will see.

#### **Partnerships:**

##### **Key Partners:**

CVVIM is the sole provider of all healthcare services provided to eligible patients, however, as a matter of routine service delivery, we have numerous partners we work with in the community in numerous ways.

We have agreements with local universities and hospitals, as well as other educational institutions to provide educational opportunities for medical residents and other students. We

also work with the Office On Aging and the County of Riverside, DPSS to provide job training for senior workers and welfare recipients. All of these are vital to the residents/students and our patients who benefit from their training and education while at the clinic to provide direct patient care.

We have agreements and relationships with healthcare organizations who assist us with licensed provider credentialing, and also with medical supply/service vendors for the provision of donated x-ray services, and discounted services for laboratory tests and imaging services, all of which have a positive impact on our budget allowing us to serve more patients with no-charge healthcare services.



## Line Item Budget

## Operational Costs

PROGRAM OPERATIONS		Total Program/Project Budget	Funds from Other Sources <i>Detail on sheet 3</i>	Amount Requested from DHCD
<b>Total Staffing Costs</b> <i>Detail on sheet 2</i>		627,438	300,000	33,388
<b>Equipment (itemize)</b>				
1				0
2				0
3				0
4				0
<b>Supplies (itemize)</b>				
1	Clinical Supplies	18,800		7,050
2	Office Supplies & Expenses	4,500		0
3				0
4				0
<b>Printing/Duplication</b>		11,200		0
<b>Mailing/Postage</b>		14,900		0
<b>Travel/Mileage</b>		3,000		0
<b>Education/Training</b>		6,250		0
<b>Office/Rent/Mortgage</b>		94,200	94,200	0
<b>Telephone/Fax/Internet</b>		6,318		0
<b>Utilities</b>		17,628		0
<b>Insurance</b>		7,672		0
<b>Other facility costs not described above (itemize)</b>				
1	Janitorial	14,750	12,635	0
2	Building Repair & Maintenance	20,138		0
3	Advertising & PR	16,103		0
4	Bank Fees; Audit; Accounting fees	17,275		0
<b>Other program costs not described above (itemize)</b>				
1	Care Delivery Costs	69,000	12,000	9,562
2	Hazardous Waste Disposal	960		0
3	External Costs ( licenses, etc.)	3,875		0
4	Volunteer Costs	4,375		0
5	Other Program Costs (all IT)	12,000		0
6	Major Fundraising Costs (incl prsnl)	92,516		0
<b>Total Program Budget</b>		<b>1,062,898</b>	<b>594,063</b>	<b>50,000</b>

### 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	Executive Director	94,868	20	18,974	0
2	Clinical Operations Director	55,538	75	41,653	0
3	Event Manager	55,442	0	0	0
4	Front Desk Coordinator	35,360	75	26,520	13,125
5	Medical Assistant	36,354	75	27,266	13,633
6	DM Case Manager	17,680	75	13,260	6,630
7	Dental Assistant	17,680	75	13,260	0
8	Volunteer Coordinator	16,640	75	12,480	0
9					
<b>Total Employee Benefits</b>					0
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt;</b>	<b>33388</b>
<b>Budget Narrative</b>	Approximately 75% of CVVIM patients reside east of Cook Street.				
<b>Budget Narrative</b>	Grant funding will only be used to support positions with <b>direct</b> responsibilities for patient care - reception, scheduling, intake/eligibility (Front Office coordinator), medical assisting (Medical Assistant) and case management (DM Case Manager). For these three positions, we are requesting 37.5% of total salaries, or 50% of the 75% allocated to Program.				
Professional Services / Consultants		Hourly Rate	Hours/Week	Monthly Fee	Fees Paid by DHCD Grant
<b>Company and Staff Title</b>					
1					
2					
3					
4					
5					
<b>Enter this amount in Section 1; Staffing Costs</b>				<b>Total &gt;</b>	<b>0</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		0
Donations		248,285
<b>Grants (List Organizations)</b>		
1	DHCD (West Valley)	121,500
2	Kaiser Permanente	25,000
3	Berger Foundation	25,000
4	Other various grants	43,000
<b>Fundraising (describe nature of fundraiser)</b>		
1	Wine Lover's Auction Event	170,858
2	Other Fundraising	10,000
<b>Other Income, e.g., bequests, membership dues, in-kind services, investment income, fees from other agencies, etc. (Itemize)</b>		
1	Donated Rent	94,200
2	Donated Professional Services	300,000
3	Donated Radiology Services	12,000
4	Donated Other Services	12,635
<b>Total funding in addition to DHCD request</b>		<b>1,062,478</b>
<b>Budget Narrative</b>	<p>Donated professional, radiology and other services is over budget by \$100,827. Current total donations are OVER budget by \$18,107 and total Grant revenue is UNDER budget by \$81,525; this is largely due to timing of grant payments and is projected to be UNDER budget by end of year by only \$10,000 +/-.</p>	

## Grant Scoring Review

**Reviewer:** Donna Craig

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**Executive Summary:** 8

**Need and Alignment:** 9

**Goals:** 9

**Evaluation:** 9

**Organizational Capacity:** 8

**Organizational Sustainability:** 8

**Budget:** 9

**Percent of Funding Requested:** 9

**Fiduciary Compliance:** 8

**Financial Stability:** 8

**Key Partners/Collaborations:** 8

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**Total Score:** 93.00

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**Reviewer Comments:** VIM is the only free clinic in the Valley, assisting very low income and uninsured adults. Case management services help patients to access insurance, if eligible, and addresses the social determinants of health. All of the physicians are volunteers. VIM is an important and integral piece of healthcare in the Coachella Valley

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 94.666666666666666666666666666667 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 284 (3 of 3)

## Grant Scoring Review

**Reviewer:** Alejandro Espinoza

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**Executive Summary:** 9

**Need and Alignment:** 9

**Goals:** 8

**Evaluation:** 8

**Organizational Capacity:** 9

**Organizational Sustainability:** 8

**Budget:** 9

**Percent of Funding Requested:** 8

**Fiduciary Compliance:** 9

**Financial Stability:** 9

**Key Partners/Collaborations:** 8

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**Total Score:** 94.00

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**Reviewer Comments:** VIM is a vital healthcare resource to many east valley residents. This grant will provide them funding for several key positions and supplies that will allow them to continue to provide free quality medical care to east valley residents.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 94.666666666666666666666666666667 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 284 (3 of 3)

## Grant Scoring Review

**Reviewer:** Meghan Kane

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**Executive Summary:** 8

**Need and Alignment:** 8

**Goals:** 9

**Evaluation:** 8

**Organizational Capacity:** 10

**Organizational Sustainability:** 8

**Budget:** 10

**Percent of Funding Requested:** 10

**Fiduciary Compliance:** 10

**Financial Stability:** 10

**Key Partners/Collaborations:** 8

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**Total Score:** 97.00

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**Reviewer Comments:** Access to healthcare and dental services is an ongoing challenge faced by residents of the Coachella Valley. Volunteers in Medicine provides a free service that directly addresses the health needs of adults by providing care and helping to mitigate short-term and long-term impacts of being uninsured or under-insured. I recommend approval of the grant as VIM goes beyond providing direct health care; they provide case management to address additional barriers to health. Through case management, VIM’s team connects with families to provide direct delivery or referrals to social needs and wellness services. Providing core operating support for VIM to further their mission and vision is directly related to the District’s Primary Care and Behavioral Health Access focus area.

**Response Notes:**

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**Average Review Score:** Staff Review Stage: 94.666666666666666666666666666667 (3 of 3)

**Sum of all Reviews:** Staff Review Stage: 284 (3 of 3)



## Grant Application Scoring Rubric

Category	Exceeds expectations <i>(7-10 points)</i>	Meets expectations <i>(3-6 points)</i>	Does not meet expectations <i>(0-2 points)</i>
<b>Executive Summary</b> (10 points)	The applicant <b>includes and effectively describes</b> the project's mission and vision, the specific population the project will serve, the expected benefits to the community, the support for applicant's project in the community with evidence based proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.	The applicant <b>includes and describes</b> the project's mission and vision, the population the project will serve, the expected benefits to the community, the support for applicant's project in the community with evidence based proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.	The applicant is unclear or does not <b>include or describe</b> the project's mission and vision, the general population the project will serve, the expected benefits to the community, the support for applicant's project in the community with proposed methods, approaches and strategies are realistic, reasonable, effective, outcome-oriented.
<b>Need &amp; Alignment and Demonstrate</b> (10 points)	The applicant <b>explicitly defines a specific</b> need for the project within the identified community and <b>effectively describes</b> the alignment of that need to one of the Community Focus Areas of the District/Foundation's Strategic Plan by using data, case studies, interviews, focus group results, media attention, etc.	The applicant <b>identifies</b> a need within the identified community for the project and <b>describes</b> the alignment of that need to one of the Community Focus Areas of the District/Foundation's Strategic Plan by using data, case studies, interviews, focus group results, media attention, etc.	The applicant <b>does not clearly describe</b> a need for the project that its alignment to one of the Community Focus Areas of the District/Foundation's Strategic Plan by using data, and/or case studies, and/or interviews/focus group results, and/or media attention, etc.
<b>Goals</b> (10 points)	The applicant has provided SMART goals with an evaluation plan that is <b>fully developed</b> . The <b>SMART</b> goals are <b>specific, measurable, ambitious, realistic and time-bound</b> , and the evaluation plan will <b>accurately</b> measure the project's effectiveness.	The applicant has provided SMART goals with an evaluation plan. The <b>SMART</b> goals are <b>mostly specific, measurable, ambitious, realistic, and time-bound</b> , and the evaluation plan will measure <b>the aspects</b> of the project's effectiveness.	The applicant has provided very limited goals and evaluation plan. The goals are not specific, measurable, timebound and will weakly measure the project's effectiveness.

<p><b>Proposed Evaluation Plan</b> (10 points)</p>	<p>The applicant describes a <b>specific detailed plan of action for</b> evaluation, that includes both qualitative and quantitative assessment of the project that is well-defined with data reporting mechanisms and narrative that are clear and transparent. Evaluation is in alignment with Goals of the project.</p>	<p>The applicant describes a <b>plan of action for evaluation</b> that includes both qualitative and/or quantitative assessment of the project that is well-defined with data reporting mechanisms and /or narrative that are clear and transparent. Evaluation is in alignment with the Goals of the project.</p>	<p>The applicant <b>does not describe, or vaguely describes a reasonable plan of action</b> that can be completed during the grant period, involves some identified partners appropriately, and might make the project a reality.</p>
<p><b>% of Funding Requested – Leveraging of Outside Funds</b> (10 points)</p>	<p><b>0-50%</b> Budget shows mostly committed funds, in-kind funds for professional services and balance is from proposed funds have been identified and in place</p>	<p><b>51-70%</b> Budget shows some committed funds, in-kind funds for professional services and proposed funds making up the majority, have been identified.</p>	<p><b>71 - 100%</b> Budget shows limited to no committed funds, balance is made up of mostly identified proposed funds</p>
<p><b>Applicant Capacity and Infrastructure to Execute Proposal</b> (10 points)</p>	<p>The applicant includes concrete examples that <b>strongly demonstrate</b> that the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.)</p> <p>The <b>applicant strongly demonstrates</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support)</p>	<p>The applicant includes solid examples that <b>demonstrate</b> that the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.).</p> <p>The <b>applicant demonstrates</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support)</p>	<p>The applicant <b>does not include</b> examples that would demonstrate the human resource allocation to this project is appropriate (internal staff expertise, use of external consultants, advisory committee, etc.).</p> <p>The <b>applicant is limited in its ability to demonstrate</b> credibility for this kind of work (strength, name recognition, a history or track record of achievements, related mission and letters of support).</p>



<p><b>Organizations Sustainability</b> (10 Points)</p>	<p>The applicant <b>strongly demonstrates that it</b> has a current strategic plan and/or business plan with measurable outcomes. Strong board engagement and governance. The proposed program is <b>identified within</b> the strategic plan.</p>	<p>The applicant <b>demonstrates</b> that it has a current strategic plan and/or business plan with measurable outcomes Shows Board engagement and governance. Applicant has clearly identified that the program is <b>supported by</b> the strategic plan</p>	<p>The applicant does not <b>demonstrate</b> that it has a strategic plan and/or business plan. The program only reflects the applicant’s mission.</p>
<p><b>Budget</b> (10 points)</p>	<p>The budget is <b>specific</b> and <b>reasonable</b>, and all items <b>strongly align</b> with the described project. The budget <b>strongly demonstrates</b> financial clarity/value and tells the same story as the proposal narrative. There are no unexplained amounts. The overall value of the project (the relationship of benefits and/or participants) to costs is <b>effective</b>. Additional leveraged funding sources and in-kind services are included. Staff FTE is identified clearly. Budget includes \$XXX amounts and how these ties to staff time.</p>	<p>The budget is clear and <b>reasonable</b>, with the items <b>aligned</b> with the described project. There are no unexplained amounts. The overall value of the project (the relationship of benefits and/or participants to costs) is <b>reasonable</b> and/or <b>some</b> additional funding sources and/or in-kind services are included.</p>	<p>The budget is <b>not specific</b> and/or <b>reasonable</b>, and the items are <b>somewhat aligned</b> with the described project. The budget somewhat <b>demonstrates</b> financial clarity. There are no unexplained amounts.</p>
<p><b>Fiduciary Compliance</b> (10 Points)</p>	<p>The applicant <b>strongly demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through unmodified audited financials 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 financials on a regular basis.</p>	<p>The applicant <b>demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through unmodified audited financials produced in a timely fashion, and the board reviews financials on a regular basis.</p>	<p><b>The applicant demonstrates</b> a financial history that shows a continuous cycle of fiduciary responsibility of the Board through audited financials produced. A positive cash flow at the end of each fiscal year is not consistent. and the Board does not review financials on a regular basis.</p>

<p><b>Financial Stability</b> (10 Points)</p>	<p>Funding sources for operations and programs are coming from multiple sources and is driven by a <b>strategic plan</b> for stability for both short- and long-term growth.</p>	<p>Source of funds for operations and programs are coming from multiple sources. There is a <b>limited plan</b> in place for stability for short term only.</p>	<p>Source of funds for operations and programs are coming from limited sources. There is <b>no plan</b> for stability in place currently.</p>
<p><b>Key Partners / Collaboration</b> (10 points)</p>	<p>The applicant <b>strongly demonstrates</b> solid partnerships and collaborative approach with letters of commitment or an MOU that includes a scope of work.</p>	<p>The applicant <b>demonstrates</b> partnerships and collaborative approach with letters of commitment.</p>	<p>The applicant <b>demonstrates</b> limited or no partnerships and has not included any letters of commitment.</p>
<p><b>Comments/Notes:</b></p>			

**Total Score:** \_\_\_\_ / 110 = \_\_\_\_%

**Exceeds expectations:** 77% or Higher Fully Funded  
**Meets expectations:** 50%- 76% Full to Partial – Possible restrictions/conditions  
**Does not meet expectations:** 49% or Lower No funding to Partial funding with restrictions/conditions