



**2020/2021/2022**  
**Mental Health Services Act Grant Program**  
**Request for Applications (RFA)**

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# 1. FUNDING OPPORTUNITY DESCRIPTION

## A. Purpose

The California Department of Veterans Affairs (CalVet), Veterans Services Division (VSD), is accepting applications for the Fiscal Year (FY) 2020/2021/2022 Mental Health Services Act (MHSA) Grant Program in support of mental health outreach and support services for California veterans. The passage of the MHSA in November 2004 increased funding, personnel, and other resources to support county mental health programs and monitor progress toward statewide goals for serving Californians with mental health needs.

The purpose of CalVet's MHSA program is to expand and enhance the county mental health services for veterans, including treatment and other related recovery programs, in California communities where they reside, or return to after military service.

County Veterans Service Offices (CVSO) who wish to provide or enhance their mental health outreach and services are invited to submit funding applications for the FY 2020/2021/2022 to CalVet by Close of Business on February 14, 2020 and funding awards will be announced by March 6, 2020. To apply for funds, applicant organizations must use the CalVet standardized funding application forms located in Appendices A through C.

## B. Expectations

Funding is restricted for use in supporting mental health outreach and treatment programs and is not intended to cover overall agency expenses, major capital expenses, or other unrelated expenses. Applicants must propose activities that provide various mental health outreach and services to assist service members, veterans, and their families to successfully readjust and assimilate to civilian life. CalVet will perform site visits with conditional grantees to discuss the proposals contents and review the proposed performance measurement process to ensure valid collection and reporting of metrics.

Proposals should also adhere to the following mental health strategies as applicable:

- Provide information for mental health services for transitioning service members, veterans, and their families to ease their return from service.
- Incorporate best practices as identified within the Substance Abuse and Mental Health Services Administration National Registry of Evidence-based Programs and Practices. Visit <https://www.samhsa.gov/>
- Collaborate with federal, state, and community-based service providers and institutions of higher education.
- Enhance the access to mental and physical healthcare of veterans and their families.
- Reduce stigmas and encourage those with mental health needs to seek help by adopting educational mental health programs for veterans and their families.
- Promote programs that encourage early intervention of mental health needs for veterans and their families.
- Promote services to veterans who are “justice involved,” specifically criminal diversion, and veteran treatment court participation.
- Identify and provide referrals for underserved populations such as other than honorable discharged veterans, women veterans, and other underrepresented groups.

- Promote evidence-based mental health programs by referring their services to veterans and their families.
- Provide homeless veterans with referrals to supportive housing programs that include mental health treatment services.
- Reduce the eligibility and enrollment barriers by providing timely and effective referrals to service providers.
- Assist CalVet in optimizing the system-wide delivery of mental healthcare to veterans by reporting issues of access to care, customer and clinician satisfaction, efficiency, and delivery of quality healthcare.
- Adhere to all application and reporting deadlines.

### **C. Funding Prioritization**

In addition to the expectations and mental health strategies listed in 1-B, funding awards will also be prioritized based on the following program models:

- CVSOs that directly or indirectly partner with California Community Colleges to provide veterans and their family members behavioral healthcare on school campus
- CVSOs that directly or indirectly partner with California Community Colleges to provide veterans VA claim representatives on school campus.

To apply for grant funding, applicant organizations must use the CalVet standardized funding application forms. No match is required to apply for funds.

## **2. AWARD INFORMATION**

Upon completion of a fully executed contract, 25% of funding will be provided to participants for initial program costs, and 25% of the total award will be disbursed quarterly thereafter. Quarterly funding will only be disbursed to participants after quarterly status reports are approved by CalVet (see Section D on page 6).

Funding awards will be divided into two categories as follows:

1. \$270,000 total available for applications not exceeding \$50,000 per fiscal year (\$100,000 total) made for a twenty four month period per county in total (direct and indirect) costs per each fiscal year.
2. \$1,000,000 total available for applications not exceeding \$200,000 per fiscal year (\$400,000 total) for a twenty-four month (24) period per county in total (direct and indirect) costs per each fiscal year.\*

\*Only proposals that align with the priority areas outlined in Section 1-C (Funding Prioritization) will be considered for funding in category 2.

All awards are subject to the annual State Budget Act appropriation.

## **3. APPLICATION AND SUBMISSION INFORMATION**

### **A. Required Application Components**

**Project Narrative** – The Project Narrative describes your project. It consists of the following sections:

- Section A: Statement of Need;
- Section B: Proposed Service/Project;
- Section C: Proposed Implementation Approach; and
- Section D: Performance Assessment and Data

Detailed instructions for completing each section of the Project Narrative are provided in “Section 4 – Application Review Information.”

***Budget Form and Narrative*** – You must provide a justification narrative of the items included in your proposed budget, as well as a description of existing resources that can be leveraged and other support you expect to receive for the proposed project.

Detailed instructions for completing each section of the Budget Form and Narrative are as follows:

**Section A: Personnel** – Provide employee names (including names for each identified position) of the applicant organization, including in-kind costs for those positions whose work is tied to the proposed project. Describe the role and responsibilities of each position.

**Section B: Fringe Benefits** – List all components that comprise the fringe benefits rate (e.g., FICA, Workers Compensation, Insurance, etc.). Fringe benefits must reflect current rates for your agency.

**Section C: Travel** – Explain the critical mission need for any travel. Describe the purpose of travel and how costs were determined. Travel costs should reflect the lower of: a) your agency’s current rates for mileage, per diem, hotel, etc. or b) currently approved State of California rates.

**Section D: Supplies** – Describe the need for supplies and include an adequate justification of how each cost was estimated.

**Section E: Contracting** – List any contractual arrangements to carry out a portion of the programmatic effort or for the acquisition of routine goods or services under the grant. Such arrangements may be in the form of consortium agreements or contracts. A consultant is an individual retained to provide professional advice or services for a fee. The applicant must establish written procurement policies and procedures that are consistently applied. All procurement transactions shall be conducted in a manner to provide to the maximum extent practical, open and free competition. Explain the need for each contractual agreement, how it relates to the overall project, and why existing staff cannot perform these services.

**Section F: Other** – Expenses not covered in any of the previous budget categories. Itemize costs into cost per unit. Explain the use of each item requested.

## **B. Application Submission Requirements**

Applicants must submit their application and supporting documents by e-mail to [phillip.leggett@calvet.ca.gov](mailto:phillip.leggett@calvet.ca.gov) by close of business on **February 14, 2020**. You will receive a receipt confirmation that your application has been successfully received. Please keep a copy of this confirmation for your records. If a Board of Supervisors action is required to officially submit this application, but cannot be accomplished by the application due date, specifically state it in your cover letter and submit the application by the deadline. CalVet will consider the application a preliminary request, which allows us to begin the review/grading process as you proceed with the board agenda item. However, we may not make an award until your board action is complete.

**NOTE: In order for your county to avoid missing the first period payment, CalVet strongly recommends that you request to be on your Board of Supervisors agenda for the approval of the MHSA Grant Program when sending in your application.**

## **4. APPLICATION REVIEW INFORMATION**

### **A. Evaluation Criteria**

The Project Narrative describes what the project intends to accomplish and includes the Evaluation Criteria in Sections A through D listed below. In developing the Project Narrative section of your application, use these instructions. You must use the four sections/headings listed below in developing your Project Narrative. You must include the required information in the correct section, even if the information is duplicative of other sections, or your application will be disqualified.

Your application will be scored according to the quality of your response to the requirements for each section of the Project Narrative. The number of points after each heading is the maximum number of points a review committee may assign to that section of your Project Narrative. Although scoring weights are not assigned to individual bullets, each bullet is assessed in deriving the overall section score.

Please note that the following bullets are not meant to be all inclusive; use them to help develop your plan/project to better serve your veteran community.

### **B. Review Process**

#### **Section A: Statement of Need (10 points/500 words max)**

- With respect to the primary purpose and goals of this grant funding, describe who your program serves and how participants are identified and engaged in the program. The application should reflect a clear understanding of the need that your proposal is addressing.
- Describe the geographic area that the program serves and any significant factors that your location has contributed to the need of the target population; address any barriers or existing service gaps to accessing the program by any segment of the target population. Where available, use local data to support the extent of the need.

#### **Section B: Proposed Service/Project (30 points/1000 words max)**

- Describe the purpose of the proposed project, including a clear statement of its goals and objectives. These must relate to the performance measures you identify in Section D, Performance Assessment and Data.
- Identify the service(s)/practice(s) that you propose to implement and discuss how those address the purpose, goals and objectives of your proposed project. Also, include the source of your information.
  - Discuss the evidence that shows that this practice is effective with your target population.
  - Document any evidence that the practices you have chosen to implement are appropriate for the outcomes you intend to achieve.
- If the program has multiple components, each component should be listed and clearly described in detail.

#### **Section C: Proposed Implementation Approach (40 points/1500 words max)**

- Describe and provide a rationale for the anticipated impact the proposed project will have on your veteran community. Include specific references to the recommendations from section 1-B/C.
- Describe how achievement of the goals will produce meaningful and relevant results (e.g., increase access, availability, prevention, outreach, pre-services, treatment, and/or intervention).
- Describe how you will or will facilitate the screening and assessment of clients for the presence of co-occurring mental and substance use disorders and use the information obtained from the screening and assessment to develop appropriate referral services for the persons identified.
- Clearly state the unduplicated number of individuals you propose to serve annually with these funds, including the types and numbers of services to be provided and anticipated outcomes. **NOTE:** Unduplicated number of individuals means not counting a veteran receiving services twice (i.e., filing a claim for a mental health-related illness and then referring them to the VA for counseling).
- Identify any other organizations that will participate in the proposed project. Describe their roles and responsibilities and demonstrate their commitment to the project, and supply supporting documents such as letters of support, service agreements, and memorandums of understandings.
- Describe any potential barriers to successful conduct of the proposed project and how you will overcome them.
- Describe any prior experience that would demonstrate your ability to successfully implement and manage your proposed program.
- Describe your plan to continue the project after the funding period ends. Also, describe how program continuity will be maintained when there is a change in the operational environment (e.g., staff turnover, change in project leadership, etc.) to ensure stability over time.

#### **Section D: Performance Assessment and Data (20 points/1,000 words max)**

Document your ability to collect and report on the required performance measures on a periodic and annual basis. Describe your plan for data collection, management, analysis and reporting. Specify and justify any additional measures or instruments you plan to use for your grant project. Describe how data will be used to manage the project and assure continuous quality improvement, including consideration of behavioral health disparities.

CalVet will perform site visits with potential grantees to review reporting metrics and implementation procedures.

In addition to any narrative related to Performance Assessment and Data, applicants must provide a corresponding table listing all proposed performance measures, summarizing where/how data will be collected for each performance measure, the goal for each performance measure (to be achieved by the end of the funding year), and provides space to report actual data at the end of each period and final (annual) result. This table must be included as an attachment with each periodic report. CalVet wants as much detail in the Performance Metrics as possible. Each category in the Performance Metric needs to clearly explain how it relates to Mental Health Services/Programs. Also, if the category has more than one program/service option, please sub-categorize.

A sample is provided below.

| <b>Performance Metric</b>  | <b>Data Source</b>   | <b>Goal</b>         | <b>Quarter 1a</b>                 | <b>Quarter 2a</b> | <b>Quarter 3a</b> | <b>Mid-Program Review</b> |
|--|--|---------------------|-----------------------------------|-------------------|-------------------|---------------------------|
| Your performance metric #1<br>(Explain how it relates to the funded Mental Health Services/Programs) | Where will the data come from?<br>How will you collect data? | End of project goal | Fill in for your periodic report. |                   |                   |                           |
| Your performance metric #2<br>(Explain how it relates to the funded Mental Health Services/Programs) | Where will the data come from?<br>How will you collect data? | End of project goal | Fill in for your periodic report. |                   |                   |                           |
| <b>Performance Metric</b>  | <b>Data Source</b>   | <b>Goal</b>         | <b>Quarter 1b</b>                 | <b>Quarter 2b</b> | <b>Quarter 3b</b> | <b>Final</b>              |
| Your performance metric #1<br>(Explain how it relates to the funded Mental Health Services/Programs) | Where will the data come from?<br>How will you collect data? | End of project goal | Fill in for your periodic report. |                   |                   |                           |
| Your performance metric #2<br>(Explain how it relates to the funded Mental Health Services/Programs) | Where will the data come from?<br>How will you collect data? | End of project goal | Fill in for your periodic report. |                   |                   |                           |

### C. Application Scoring

Applications are reviewed by a panel comprised of CalVet staff and will be rated on a 100-point scale. All final funding decisions will be made by the CalVet Deputy Secretary for Veteran Services.

## 5. REPORTING REQUIREMENTS

Applicants receiving funding must provide three quarterly progress reports for the first funding year, a mid program review containing 4<sup>th</sup> quarter metrics, three quarterly progress reports for the second funding year, and a cohesive final report at the end of the 24 month program cycle. These reports must be attached to an itemized invoice for payment no more than 30 days after each quarter ends. Counties may be subject to losing that quarter's funding if the report is received late. Each report must include the data described in section D (page 6). Electronic submission of reports and invoices is preferred (via e-mail with a scanned/PDF copy of the report and invoice).

Participants must also provide a mid-program review at the end of the 1<sup>st</sup> funding year that also includes 4<sup>th</sup> Quarter metrics, as well as a final report at the end of the 24 month grant cycle. Both the mid program review and final report must summarize information from the quarterly reports, describe the accomplishments of the project, and describe next steps for implementing any plans for additional work identified during the funding period.



In anticipation that each proposal will have unique reporting needs applicants should be aware that CalVet may provide you with additional reporting guidelines and requirements at the time of award. CalVet staff will use the information contained in the reports to determine your progress toward meeting project goals.

## **6. AGENCY CONTACTS**

For questions about eligibility, application forms or process, or feedback on your organization's proposed program, please contact

Samuel Griffin  
*Operations Manager*  
Veterans Services Division  
California Department of Veterans Affairs  
[samuel.griffin@calvet.ca.gov](mailto:samuel.griffin@calvet.ca.gov)  
(916) 503-8073

Phillip Leggett  
*Mental Health Coordinator*  
Veterans Services Division  
California Department of Veterans Affairs  
[phillip.leggett@calvet.ca.gov](mailto:phillip.leggett@calvet.ca.gov)  
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## Appendix A – Program Narrative

### **San Bernardino County Veterans Affairs Veterans Free Legal Clinics Program Narrative**

#### **Section A: Statement of Need (500 words max)**

Southern California has one of the highest veteran populations in the nation. The most recent US Census report for Veteran Status 2013-2017 shows San Bernardino is home to over 93,000 veterans. San Bernardino veterans disproportionally make up over half of the adult population living at or below the poverty level. Alarming, the veteran population represents nearly 70% of unemployed residents in the county. The veteran population spans all eras of service: Post 9/11 (17%), Gulf War (17%), Vietnam Era (37%), Korean War (9%), and World War II (3%). At least 30% of the veteran population reports some level of disability and over 65% are older veterans. Minority and women veterans are disproportionately affected by homelessness. In recent years, the Veterans Administration Hospital in Long Beach recognized women veterans are their fastest growing group. Recent studies note MST is greatly under reported, and women veterans are more likely to commit suicide than civilians.

To reach transitioning service members, veterans (including those attending California Community Colleges), and families, San Bernardino VSO will host a monthly free legal clinic dedicated to outreach which removes barriers for those who may not have reliable transportation, internet, or phones. Through a continuing MOU with VLI, San Bernardino VSO will focus on homeless and/or low-income clients whose access to or maintenance of mental health treatment requires direct legal aid, which clients could otherwise not afford. Low income clients may earn on average less than \$1,500 per month. Veteran college students may be living in cars, couch surfing, or living frugally on their educational benefits. We expect to continue to serve veterans living with significant mental health issues. Veterans who do exceed LMI will be provided with general advice and counsel with referrals to veteran advocate attorneys. The geographic area focuses on San Bernardino County; with collaborations with neighboring Orange and Riverside Counties.

Participants will be identified and engaged during intake interviews and/or referrals. We expect service members, family advocates, or collaborating agency referrals requesting legal assistance for mental health issues.

San Bernardino County Veterans Affairs has an ongoing relationship with the six California Community Colleges in the county. County VA plans to implement a Welcome Home Program in May 2020 which provides veterans newly discharged from active duty information for county and local services available to them and their families at no cost. The community colleges include: San Bernardino Valley, Crafton Hills, Chaffey, Victor Valley, Copper Mountain, and Barstow.

VLI has significant impact across Orange County and Southern California as one of the few public interest law firms in the nation dedicated to veterans. Since its founding, VLI has opened over 6,000 cases and restored over two million dollars in veterans benefits, with over 215 cases for San Bernardino veterans when they had no other recourse, of which 35 were discharge upgrades. VLI co-sponsors veteran summits, provides leadership in local collaborations and OCVMF, receives significant awards, is recognized by the State of California as a “multiple activity provider,” and regularly offers the 3-hour VA Accreditation course.

#### **Section B: Proposed Service/Project (1000 words max)**

#### Project's Purpose:

The purpose of the Veterans Free Legal Clinic is to provide outreach for transitioning service members, veterans (including those attending California Community Colleges), and their families to remove legal barriers preventing access to or maintenance of mental and physical health care.

#### Project's Goals:

- 1) Increase the number of clients receiving access to mental health treatment as a result of civilian or military legal barriers being removed.
- 2) Increase the number of clients receiving mental health resource information.
- 3) Quantify the number of transitioning clients requesting free legal aid to access mental health treatment.
- 4) Quantify the number of underrepresented clients requesting free legal aid to access mental health treatment.

#### Project's Objectives:

- 1) Host a monthly, 3 hour, free legal aid clinic on site, for a total of 12 clinics over the course of a full calendar year; a total of 24 clinics over the 2-year project. VLI will also accept incoming referrals, including those related to veterans benefits and disability claims among other related issues.
- 2) Provide capability to directly serve up to 9 clients/families per clinic.
- 3) Offer 100% of clients mental health resource information (flyers, brochures) on local, state, and federal levels.

#### Services:

San Bernardino VSO will provide office space, set and greet appointments, and inform clients about local mental health resources. Clients and/or their family members can make appointments by phone or walk in during clinic hours. Collaborating agencies can make referrals. To help publicize the free legal clinics, the San Bernardino VSO will advertise dates and hours on website and posted flyers. For those clients who cannot attend the clinic times and require legal advice, San Bernardino VSO will refer clients to VLI for care.

VLI will provide free legal aid for the clinic and accept all legal referrals. Being military specific, VLI will ensure attorneys and supporting staff have military experience and/or are military dependents. VLI will provide free legal services for civilian and military legal matters. Specialized areas of the law will be matched to local pro bono attorney firms. Pro bono legal services will include (but may not be limited to): veterans benefits, disability compensation, limited family law, limited housing, employment, discharge upgrades, criminal law, consumer law, and community development. For clients who do not meet the income requirements to be retained and require legal services, they will be referred to local attorneys who are veteran advocates. No client or family will ever receive a bill.

#### **Section C: Proposed Implementation Approach (1500 words max)**

#### Anticipated Impact:

The San Bernardino VSO and VLI expects the Veterans Free Legal Clinics will address 12 of the 13 recommendations described in Section 1B. Because this clinic will focus on outreach activities and removing legal barriers to access, the recommendation that San Bernardino VSO and VLI cannot meet is incorporating best practices for mental health treatment. However, we will ensure our clients receive information and referrals to local providers who already follow the Substance Abuse and Mental Health Services Administration's evidence-based programs and practices.

To further address the Section 1B recommendations, San Bernardino VSO and VLI will be able to:

- 1) Leverage office space, websites, and social media presence to provide widest range of information on mental health service for transitioning and underrepresented service members, veterans, and families.
- 2) Leverage current federal, state, and community-based service providers and institutions of higher learning. VLI has long-standing relationships with Community Colleges in Orange County and is confident to develop relationships with Veterans Resource Centers in the Community Colleges in San Bernardino.
- 3) Enhance access to mental and physical healthcare of veterans and families by removing legal and administrative barriers for veterans and families - eg. VLI recently resolved a VA appeal which had lasted for over 8 years for a veteran trying to receive medical treatment.
- 4) Reduce stigmas and promote programs to empower mental health by fully utilizing our proven peer support approach.
- 5) Identify and provide referrals for underserved populations by leveraging paid and volunteer staff, as well as established cadre of over 80 pro bono attorneys - which includes close collaboration with David Ruegg, Esq, who is connected to the East West Family Law Council, the San Bernardino Bar, and Riverside Bar.
- 6) Provide homeless veterans with housing support that includes mental health care by using existing collaborations- eg. VLI's relationships with Affordable Housing Access and Volunteers of America (which has repeated success in securing up to 5 month's rent to help stabilize housing).
- 7) Reducing eligibility and enrollment barriers through expert staff in Veterans Affairs and legal services.
- 8) Assist CalVet in optimizing system-wide health care delivery specifically in the area of access through VLI's Clio system and experienced data analysis/program management volunteers.
- 9) Meet all application and reporting deadlines using our current staff and volunteer resources, which can include cloud sharing data and files.

#### Relevant Results:

Achieving the goals of the Veterans Free Legal Clinics will produce meaningful results by empowering our clients and their families to realize their potential for full, self-sufficient, and connected lives. When access to legal aid is made to those who could otherwise not afford it, lives are changed - one individual or family at a time. San Bernardino VSO and VLI are visible in the veteran community. Including 12 additional free legal clinic dates will increase access, availability, and outreach for service members or family advocates by leveraging our combined resources and collaborations. In 2019, at least 30% of VLI clients were served through its mobile clinics; requests included veterans benefits, estate planning, housing, family law, consumer law and expungements; ages ranged from 19 to 103 with an average of 51 years of age; and improved the quality of life for over 350 dependent children.

#### Facilitating Screening, Assessment, and Referrals:

San Bernardino VSO and VLI will work in tandem with our local evidence-based practitioners.

#### Unduplicated Individuals:

The Veterans Free Legal Clinics will serve up to 80 unduplicated individuals annually for a total of up to 160 over the 2-year project period. Services that will be provided are informing and referring clients to mental health resources and removing legal barriers to mental health care. The legal barriers may be general civilian, military specific, or justice involved. The anticipated outcome is that these clinics will increase the number of homeless, low income, disabled, and/or at-risk clients who can access or maintain mental health care.

#### Other Organizations:

Veterans Legal Institute will be the primary collaborator. Their role and responsibilities will be to handle all qualified client legal issues so that our target clients and families can increase wellness, both mentally and physically. We understand there are complex factors leading to being justice involved, homeless, and/or low income that legal intervention can turn around. VLI has included a letter of support.

#### Potential Barriers:

We expect to navigate barriers with time, combat experience, and gender.

For time, an average case can take 15 hours before being resolved. In Military Sexual Trauma, this average jumps to 500 hours because of case complexity. In addition, legal assistance can range from needing a week to 9 months to complete. So, reporting the dollar amount or verification of access to life empowering mental health care will be affected. This can be overcome with categorizing cases as initiated, in progress, and completed.

With combat experience and gender, both San Bernardino VSO and VLI have experience that service members and veterans respond best to those that have had the same experiences. Hundt et al. (2015) echoes this perception in that veterans suggested those with "...MST, female Veterans, and OEF/OIF Veterans may benefit from separate groups" (para. 61). For this reason, San Bernardino VSO and VLI will ensure both male and female providers are available for intake and care during the Veterans Free Legal Clinics.

#### Successful Prior Experience:

VLI has a history of depth and success with multiple strategic outreach clinics through Orange, Los Angeles, San Bernardino and Riverside Counties. VLI is in its third year of operations of Prop 63 funded clinics at the OCVSO location, and is halfway through its first successful year at in San Bernardino and Riverside where clinics are booked several months in advance. At the time of this proposal veterans have ranked their experiences as an average of 4.5 out of 5. Recent client responses include:

"Thank you so much for your support to us veterans. You relieve the stress of legal issues."

"The service they provided was exceptional. The personnel there ensured that I understood my options and followed up afterwards. Unfortunately, I was not eligible for the service that I requested but they continued to ensure I understood all my options."

"I truly appreciate all the help that VLI has provided. It has made all the difference in the world and now I have a second chance to get my affairs in order and have a successful future."

As well, VLI in partnership with the Starbucks Armed Forces Network was the first to bring "Military Mondays" to the West Coast. This monthly legal clinic is nestled across from the Santa Ana homeless quarter. VLI also runs a monthly clinic at the Veterans Administration in Long Beach. On a bimonthly basis,

VLI hosts clinics at Saddleback College and the City of Mission Viejo. In October 2016, VLI added a North County Vet Clinic. Each of the clinics has the primary purpose of outreach, presentations, and one on one meetings to remove legal barriers preventing transitioning service members, veterans, and their families from being self-sufficient. VLI has empowered their clients to stay in homes, gain educational benefits, receive health care, and improve employment. Further, VLI has experience in serving student veterans, transitioning service members and veterans who are women, justice involved, and those who self-identify as Native American and LGBTQI.

#### Sustainability Plan:

San Bernardino VSO and VLI are committed to continuing outreach and direct service based on VLI's success with this grant over the past three years. VLI will leverage existing relationships with Community Colleges, direct donations, an increasing volunteer development base for grant writing and fundraising, our annual Lawyers for Warriors Networking and Fundraising Event which now sells out to over 400 attendees, return investments with ongoing support from the Orange County Bar Association Charitable Fund and the State Bar of California amongst others, and new grant and fellowship opportunities that present after our recent national recognition in being chosen by the veteran community as the Veterans Choice Award at the 5<sup>th</sup> Annual Vettys.

#### **Section D: Performance Assessment and Data (1000 words max)**

VLI will collect, manage, and assess data using and their detailed intake form and extensive computer reporting system called Clio.

VLI's intake form is kept on file and documents:

1. Name/address/phone/email
2. DOB
3. Service branch
4. Years of service
5. Current status (disabled, veteran, reservist, active service member)
6. Post 9/11
7. Household income
8. Gross monthly income
9. Household assets/value
10. Type of legal service seeking (discharge upgrade, veteran benefit appeals, expungement, etc.)
11. Description of issue and assistance sought.

Clio defines various types of outcomes/outputs for education, employment, housing, and healthcare -- including specificity for mental health. For general civilian legal issues, Clio reports on money won, money waived, reason closed, and how the case was resolved. In military specific areas, Clio measures outcome achieved and what types of benefits are newly achieved as a direct result, whether monetary or in terms of benefits now accessible.

| Performance Metric                       | Data Source                     | Goal                  | Quarter 1A | Quarter 2A | Quarter 3A | Mid-Program Review |
|--|---------------------------------|-----------------------|------------|------------|------------|--------------------|
| #1) Increase number of clients receiving | Data will come from VLI as they | Up to 80 unduplicated |            |            |            |                    |

|   |  |  |                   |                   |                   |              |
|---|--|--|-------------------|-------------------|-------------------|--------------|
| legal aid to remove legal barriers preventing access to or maintenance of behavioral healthcare.  | use intake forms and update results in Clio.                                 | clients/year for a total of 160 by the end of the project.                       |                   |                   |                   |              |
| #2) Increase number of clients receiving mental health resource information   | Data will come from VLI staff reports on clinic activity.                    | 100% of clients will be offered mental health resource brochures and flyers      |                   |                   |                   |              |
| #3) Quantify number of transitioning clients.   | Data will come from VLI as the complete intake forms and update Clio.        | 100% of target clients will be included in counts.                               |                   |                   |                   |              |
| #4) Quantify number of underrepresented Veterans referred to evidence based mental health professionals. To include women Veterans, Native American Veterans, LGBTQI Veterans, Other Than Honorable Discharged Veterans, and Justice Involved Veterans. | Data will come from VLI as they use intake forms and update Clio.            | 100% of target clients will be included in count.                                |                   |                   |                   |              |
| <b>Performance Metric</b>   | <b>Data Source</b>   | <b>Goal</b>  | <b>Quarter 1B</b> | <b>Quarter 2B</b> | <b>Quarter 3C</b> | <b>Final</b> |
| #1) Increase number of clients receiving legal aid to remove legal barriers preventing access to or maintenance of behavioral healthcare.   | Data will come from VLI as they use intake forms and update results in Clio. | Up to 80 unduplicated clients/year for a total of 160 by the end of the project. |                   |                   |                   |              |
| #2) Increase number of clients receiving mental health resource information   | Data will come from VLI staff reports on clinic activity.                    | 100% of clients will be offered mental health resource brochures and             |                   |                   |                   |              |

|   |   |  |  |  |  |  |
|---|---|--|--|--|--|--|
|   |   | flyers   |  |  |  |  |
| #3) Quantify number of transitioning clients.   | Data will come from VLI as the complete intake forms and update Clio. | 100% of target clients will be included in counts. |  |  |  |  |
| #4) Quantify number of underrepresented Veterans referred to evidence based mental health professionals. To include women Veterans, Native American Veterans, LGBTQI Veterans, Other Than Honorable Discharged Veterans, and Justice Involved Veterans. | Data will come from VLI as they use intake forms and update Clio.     | 100% of target clients will be included in count.  |  |  |  |  |

## Appendix B – Budget Form

|   |                    |                                |                               |               |
|---|--------------------|--------------------------------|-------------------------------|---------------|
| <b>San Bernardino County Veterans Affairs</b> |                    |                                |                               |               |
| <b>Veterans Free Legal Clinics</b>            |                    |                                |                               |               |
| Budget Form                                   |                    |                                |                               |               |
| <b>A. Personnel</b>                           |                    |                                |                               |               |
| <b>Position</b>                               | <b>Hourly Wage</b> | <b>Hrs/Mo Spent on Program</b> | <b>Mo/Yr Spent on Program</b> | <b>Cost</b>   |
| Executive Secretary II                        | \$30.03            | 13.88                          | 24 Months                     | \$10,000      |
| [Insert Position]                             | [Insert Wage]      | [Insert Hours]                 | [Insert Months]               | [Insert Cost] |
|   |                    |                                | <b>Total</b>                  | \$10,000      |
| <b>B. Fringe Benefits</b>                     |                    |                                |                               |               |
| <b>Component</b>                              | <b>Rate</b>        | <b>Annual Wage</b>             | <b>Cost</b>                   |               |
| [Insert Component]                            | [Insert Rate]      | [Insert Annual Wage]           | [Insert Cost]                 |               |
| [Insert Component]                            | [Insert Rate]      | [Insert Annual Wage]           | [Insert Cost]                 |               |
| [Insert Component]                            | [Insert Rate]      | [Insert Annual Wage]           | [Insert Cost]                 |               |
|   |                    | <b>Total</b>                   | [\$[Insert Cost]              |               |
| <b>C. Travel</b>                              |                    |                                |                               |               |
| <b>Location</b>                               | <b>Purpose</b>     | <b>Rate (Mileage Only)</b>     | <b>Cost</b>                   |               |
| [Insert Location]                             | [Insert Purpose]   | [Insert Rate]                  | [Insert Cost]                 |               |
| [Insert Location]                             | [Insert Purpose]   | [Insert Rate]                  | [Insert Cost]                 |               |
| [Insert Location]                             | [Insert Purpose]   | [Insert Rate]                  | [Insert Cost]                 |               |
| [Insert Location]                             | [Insert Purpose]   | [Insert Rate]                  | [Insert Cost]                 |               |
|   |                    | <b>Total</b>                   | [\$[Insert Cost]              |               |
| <b>D. Supplies</b>                            |                    |                                |                               |               |



| Items                      | Rate (Cost x Months) |  | Cost             |
|----------------------------|----------------------|--|------------------|
| [Insert Items]             | [Insert Rate]        |  | [Insert Cost]    |
| [Insert Items]             | [Insert Rate]        |  | [Insert Cost]    |
| [Insert Items]             | [Insert Rate]        |  | [Insert Cost]    |
|                            | Total                |  | [\$[Insert Cost] |
| E. Contracting             |                      |  |                  |
| Name                       | Service              | Rate (Cost/Individual x Individual x Days) | Cost             |
| Veterans Legal Institute   | Free Legal Services  | \$563                                      | \$90,000         |
| [Insert Contractor]        | [Insert Service]     | [Insert Rate]                              | [Insert Cost]    |
|                            |                      | Total                                      | \$90,000         |
| F. Other                   |                      |  |                  |
| Item                       | Rate                 |  | Cost             |
| [Insert Item]              | [Insert Rate]        |  | [Insert Cost]    |
| [Insert Item]              | [Insert Rate]        |  | [Insert Cost]    |
| [Insert Item]              | [Insert Rate]        |  | [Insert Cost]    |
|                            | Total                |  | [\$[Insert Cost] |
| Totals                     |                      |  |                  |
| Section A: Personnel       | \$10,000             | Section D: Supplies                        | [Insert Cost]    |
| Section B: Fringe Benefits | [Insert Cost]        | Section E: Contracting                     | \$90,000         |
| Section C: Travel          | [Insert Cost]        | Section F: Other                           | [Insert Cost]    |
|                            |                      | Total Requesting                           | \$100,000        |

## Appendix C – Budget Narrative

### San Bernardino County Veterans Affairs Veterans Free Legal Clinics Budget Narrative

#### Section A: Personnel

San Bernardino County provides administrative support for the legal clinic throughout the month. These tasks are the major tasks performed by staff:

1. Make appointments for veterans.
2. Respond to telephone calls to explain the program and services offered.
3. Call veterans to confirm their appointment the day prior to the clinic.
4. Setup each of the two conference rooms with a copy machine, scanner, and printer.
5. Provide administrative support to VLI attorneys.
6. Assist veterans with completing the legal clinic intake form prior to appointment.
7. Hand out and collect evaluation form.
8. Escort veterans to and from VA lobby to conference room for appointment.

Hourly breakdown during each month:

Day of clinic – 5 hours

Clinic scheduling support: 8.9 hours

Executive Secretary II cost - \$30.03 per hour

Annual Support hours: 166.50

Annual Support cost: \$5,000 x 2 year project period = \$10,000

#### Section B: Fringe Benefits

None

### Section C: Travel

None

### Section D: Supplies

None

### Section E: Contracting

San Bernardino VSO does not have legal staff and will contract with Veterans Legal Institute (VLI) – who is a military specific, pro bono legal aid organization with a history of serving our San Bernardino veterans when they have had no other recourse to free legal aid. While other public interest firms assist low-income clients in San Bernardino County, they do not have a publicized focus on veterans or specialized veteran programs or units. As such, VLI has unique and successful experience empowering our transitioning, student, and underrepresented veterans and is capable of travel to San Bernardino County VSO to provide the monthly on-site clinic while managing legal cases from its home office in Santa Ana, CA. Since its founding in 2014, VLI has opened over 6,000 cases and restored over two million dollars in veteran benefits. VLI's client population is 16% women veterans, which is double the estimate of women veterans making up 8% of the total veteran population in California.

All of the management has military experience and most of the staff are either veterans or veteran spouses. VLI uses a standard intake form. VLI will complete all work in house and will reach out to other pro bono attorneys in San Bernardino County for specialized areas of the law if needed. No veteran in need will ever receive a bill. In this way, VLI validates recent published findings that veterans accept more resources and have better outcomes through peer contact.

VLI will leverage their matching grants and leadership collaborations. This will include VLI's continuing partnerships with the Orange County Bar Association Charitable Fund, the State Bar of California with IOLTA/EAF funding, and build upon the network and history of collaboration in The Orange County Veterans and Military Families Collaborative which represents over 80 organizations, many of which have relationships with San Bernardino County organizations. VLI has a platinum rating with Guidestar, is accredited through The Patriots Initiative, and recently won national recognition with the veteran community voting for VLI as the Veterans Choice Award at the 5<sup>th</sup> Annual Vettys.

Further, VLI will leverage its relationships with San Bernardino attorneys in private practice. David Ruegg, Esq has already expressed commitment to coordinating pro bono attorneys in his San Bernardino and Riverside County bar groups and East West Family Law Council. Mr. Ruegg has also received confirmation that multiple attorneys with Holstrom, Block & Parke, APLC will support the San Bernardino VSO clients. They include Dayn Anthony Holstrom, Esq., Ronald Burton Funk, Jr., Esq., and Michelle M. Brooker, Esq. Many of these attorneys practice in both Riverside and San Bernardino County.

The contract will be through MOU. VLI will provide the legal services to transitioning and underrepresented veterans through 12 monthly clinic dates and referrals over the course of one calendar year, for a total of 24 in the 2-year period. From VLI's past experience, they expect to serve up to 80 unduplicated veterans over the course of the clinics and referrals per year, for a total of up to 160 unduplicated veterans over the 2-year period. MHSA 202/2021/2022 funding will cover personnel costs to provide direct legal services, including recruitment and coordination of pro bono attorneys. VLI will leverage other expenses for fringe, necessary insurances and malpractice, postage, printing, legal software, internet, and training through other funding sources. Conservatively, a client receives an average value of \$350 per hour in private bar rates that the veteran would otherwise not be able to afford. VLI will leverage managing attorney, law clerks, and data.

Letters of Support are included from Saddleback College and Veterans Legal Institute.

Contracting:

0.90 FTE Staff Attorney at base salary of \$50,000 per year x 2 years = \$90,000

Total contracted services = \$90,000

#### **Section F: Other**

[Insert Text Here]