

March 26, 2012

Saint Francis Foundation  
2323 De La Vina Street, Suite 104  
Santa Barbara, CA 93105

Dear Trustees,

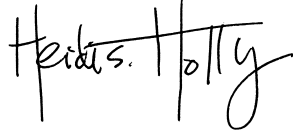
On behalf of Friendship Center's Board of Directors, staff and most importantly, the members we serve, we thank you for the Foundation's ongoing generosity in supporting our program.

We appreciate the opportunity to once again submit a request for funding to the St. Francis Foundation for our Nurse position. In addition we are requesting support for our H.E.A.R.T. (Help Elders At Risk Today) Program, which subsidizes the cost of our services for low-income aging and dependent adults and their families.

Along with our proposal, we are including a report on our staff nurse position for this fiscal year to date.

We hope to receive a favorable response to our request, and thank you for your consideration.

Best regards,

A handwritten signature in black ink that reads "Heidi Holly". The signature is written in a cursive style with a large, stylized 'H' and 'Holly'.

Heidi Holly  
Executive Director

HH/js

**Cover Sheet- (One Page Maximum)**

Funder you are applying to: St. Francis Foundation  
Legal Name of Applicant Organization: Friendship Adult Day Care Center, Inc.

Contact Person & Title: Heidi Holly, Executive Director  
Phone: 805-969-0859 Fax: 805-565-3828 Contact Person's Email: heidi@friendshipcentersb.org

Program Name/Capital Request: Onsite Registered Nurse/H.E.A.R.T. (Help Elders At Risk Today)  
Funds will pay for: Partial funding of services of onsite registered nurse at both locations: Goleta and Santa Barbara, and partial funding of H.E.A.R.T. (Help Elders At Risk Today) Program

Full Mailing Address: 89 Eucalyptus Lane, Santa Barbara CA 93108  
Location(s) if different from above: N/A  
Executive Director: Heidi Holly Email: heidi@friendshipcentersb.org  
Fax: 805-565-3828 Phone: 805-969-0859  
Website: www.friendshipcentersb.org

Tax-exempt Status: {Most funders require 501(c)(3) status. Check this requirement before applying}  
X501(c)(3) Granted  Other:  Tax ID Number: 95-3398938

Type of Request: Check with individual funders to determine the types of accepted grant requests.

Note: Check all that apply.

General Support     Program Support     Seed Funding     Research  
 Capital     Endowment     Multi-Year     Collaborative

This Grant Request: \$20,000 Of Total Budget: \$579,500


Funds will be used from: July 1, 2012 To: June 30, 2013

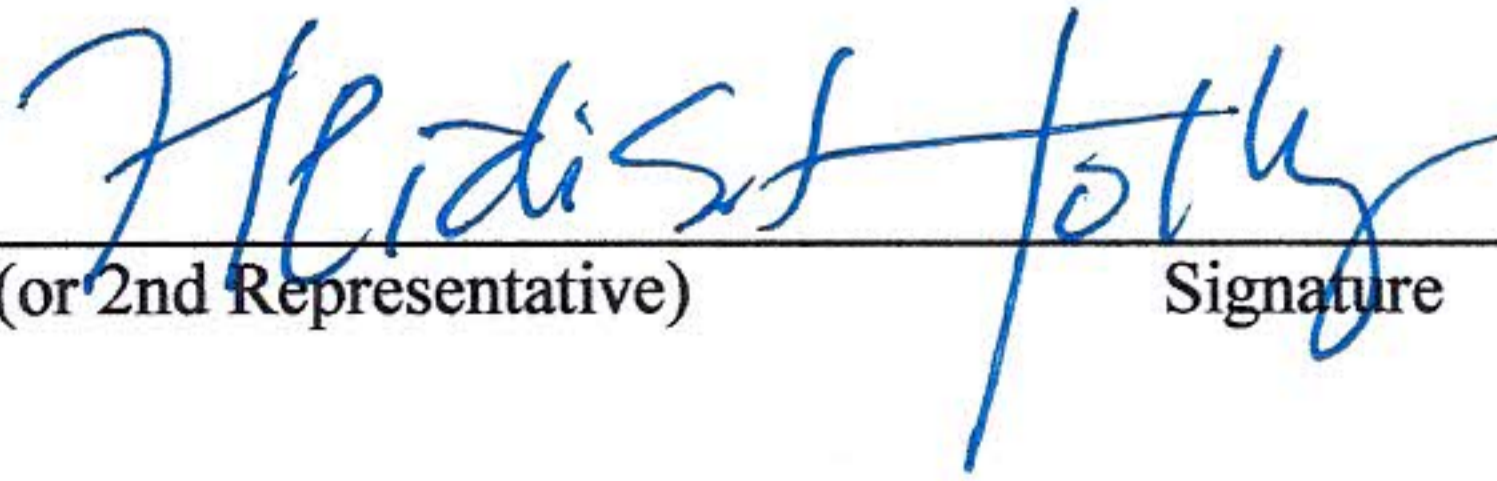
Total Organizational Budget -Current Year: \$1,396,000 Agency fiscal year begins: July 2012

Summarize the organization's mission statement (two to three sentences):  
**Friendship Center** preserves and enriches the quality of life for aging and dependent adults through innovative programs that value the dignity and worth of every person. We provide respite, support and education, enabling families to continue to be engaged in their community, careers and commitments.

Summarize your grant request (two to three sentences):  
This request for \$20,000 will enable Friendship Center to continue providing the services of an onsite registered nurse at both sites, a vital component of the day services program. It will also support our H.E.A.R.T. (Help Elders At Risk Today) Program in ensuring that our services are affordable to the over 70% of our members who qualify as low-income.

Proposal Authorization: We certify that the information in this application is to the best of our knowledge true and accurate and is submitted with our Board of Directors'/Governing Body's full knowledge and endorsement:

Marty Moore, Board President  3-23-12  
Name/Title of Authorized Board/Governing Body Representative    Signature    Date

Heidi Holly, Executive Director  3/23/12  
Name/Title of Lead Staff Member (or 2nd Representative)    Signature    Date

# FRIENDSHIP ADULT DAY CARE CENTER PROPOSAL

## **Background (One page or less)**

### **1. Your organization's history and accomplishments.**

Founded in 1976, Friendship Center is the *only* non-profit supervised adult day services program on Santa Barbara County's south coast. The agency's mission is to preserve and enrich the quality of life for aging and dependent adults through innovative programs that value the dignity and worth of every person. We provide respite, support and education, enabling families to continue to be engaged in their community, careers and commitments.

Providing affordable services is an important part of our policy. As only approximately 44% of revenue is derived from participant contributions, Friendship Center must rely heavily on funding from charitable foundations, special events and the generosity of the community as a whole.

Last year, Friendship Center's average daily attendance was 50, up from 45 in FY09-10. This increase is partly due to the weekly "brain fitness" program for those with early memory loss, Connections, held in both Goleta and Santa Barbara. Over 30,100 meals and snacks were served. Over 92,650 hours of adult day services were provided, with over 104,230 hours of respite for family members and caregivers. It is important to remember that for each program participant, an average of 2.5 caregivers receive respite from the services that Friendship Center provides on a year-round basis.

### **2. Your current programs and activities. Include the constituency you serve, with specific demographic information. How are they actively involved in your organization and/or how do they benefit from your organization's work?**

Friendship Center provides day services for dependent adults Monday through Friday, 8am to 5pm in a beautiful, safe, compassionate and nurturing environment. Some of the main goals of the Center's activities program are to maintain quality of life, dignity and as much independence as possible for our participants, as well as providing socialization and mental and emotional stimulation. Respite for our participants' caregivers is the other vital component of our program. Many elders and other dependent adults experience feelings of isolation, loneliness and fear that manifest in depression and anxiety. Friendship Center provides socialization, lively activities and balanced nutrition to avert these conditions and enhance the quality of life for all who attend.

Friendship Center serves individuals with dementia, developmental disabilities and other health challenges necessitating supervision, and who benefit from socialization and structured activities.

Activities include live music and dance performances, visits from local schools, chat groups, cooking classes, yoga and other exercise sessions, and current events discussions. Regular support group meetings are also provided for caregivers.

### **3. Your organization's relationships – both formal and informal – with other organizations working to meet the same need. In what way does your work differ from that of other organizations?**

Friendship Center is unique and greatly benefits the community as the only non-profit adult day services program providing affordable care in the Santa Barbara community. Friendship Center shares its resources with other local organizations and enjoys positive relationships with All Saints-by-the-Sea Episcopal Church, Alzheimer's Association, Santa Barbara Food Bank, Community Action Commission, Santa Barbara City College, Easy Lift Transportation, Adult Protective Services, Visiting Nurse and Hospice Care and Coast Caregiver Resource Center.

## **Funding Request**

### **1. Describe your program or the capital items requested, including:**

- **Whether the request is new, ongoing or for expansion**

This request is ongoing. The St. Francis Foundation has generously provided partial funding for our onsite nurse on a yearly basis for the past many years and we are truly grateful for this support. The other part of our grant request is new to the Foundation, for our long-standing H.E.A.R.T. (Help Elders At Risk Today) Program, which functions similarly to a scholarship program to subsidize the cost of services for low-income aging and dependent elders and their families.

- **What need does this request address?**

\$14,000 of our request is to partially fund the salary of our registered nurse.

As a result of improved medical care, elder and dependent adults requiring day services are more advanced in age and compromised health now than ever. In 1976 when Friendship Center was founded, the average age of participants was 73, while today, it is 85. The elderly individuals comprising the majority of Friendship Center's members have cognitive disorders, such as Alzheimer's, along with other serious physical conditions including osteoarthritis, cardiac arrhythmia or chronic pulmonary disease, hypertension, diabetes, vascular disease, Parkinson's disease, Huntington's disease, hearing deficit and blindness. There has been an increase among our members of prescribed medications in recent years, including anti-psychotics to treat chronic health conditions, with a marked increase in medication passes among our members.

Due to funding cuts, the hours of our onsite registered nurse have been reduced, and her time is divided between the two sites. However, for the aging and dependent adult participants in Friendship Center's day services program, the services of a nurse are essential in order to monitor medications and nutrition. She supervises medication passes by the staff, provides staff training on universal precautions, interfaces with physicians and creates care plans, and makes health assessments of members.

\$6,000 of our request is to partially fund The H.E.A.R.T. (Help Elders At Risk Today) Program.

The H.E.A.R.T. Program is like a scholarship system, enabling elder and dependent adults in need of day services to benefit from Friendship Center's services even if their families are unable to pay the full daily fee. Many of these families' economic situations have worsened considerably in the current recession. The Center's costs have increased dramatically in the past few years and are currently at \$95 per day per member. The average member contribution covers just 44% of this amount. Friendship Center strives to continue providing affordable day services for those in need, and to do this, support from the community is crucial.

- **Target audience, including specific demographic information**

Most Friendship Center members have Alzheimer's disease, and an increasing number are developmentally disabled. Ages range from 55 to 99, the average age being 85. 62% are female, 38% male. 75% are Caucasian; 18% are Latino; 5% are Asian/Pacific Islander; 2% are African-American. 72% have low to extremely low incomes.

Friendship Center's "other clients" are the caregivers for whom day services provide much-needed respite from their caregiving duties, with an average of 2.5 family caregivers per member. Approximately 60% are members of the "sandwich generation"—adult children with fulltime jobs, families and responsibilities of their own. Another 27% are spouses or friends who are themselves elderly. Without day services, many families would be forced to turn to full-time in-home care or residential care services, both of which cost many times what they pay for Friendship Center.

- 2. In a short paragraph, tell us your organization's or program's goals and specific outcomes for the grant period (i.e. behavior or attitudes changed, numbers served, capital projects completed, etc.). What activities and strategies will be used to achieve your stated outcomes? Please indicate a timeline for the main objectives of your proposal.**

The goal of Friendship Center is to continue providing compassionate, professional and affordable day services to elders and dependent adults in need, including attention to their changing medical needs and health signals. Our onsite nurse is a vital component of this goal. In our most recent Client Satisfaction Survey, 100% of respondents would recommend Friendship Center to others in need of respite and/or support in caring for their dependent adult loved ones, including avoiding or delaying placement in a long-term care facility. Alzheimer's disease remains one of the most critically unaddressed and underfunded public health issues in the country. With an aging baby boomer population, the number of Americans with Alzheimer's is expected to grow to 13.5 million by 2050.

- 3. How do you plan to evaluate the effectiveness or impact of the grant?**

The Center's program is evaluated on a regular basis through annual Client Satisfaction Surveys sent to caregivers, case management at weekly staff meetings and by an Advisory Committee composed of Friendship Center members and volunteers who meet once a month to discuss the program's activities and effectiveness.

- 4. Summarize the skills and relevant experience of key staff/volunteers essential to your organization's or the program's success. If your organization is collaborating with other organizations, note which ones and in what ways.**

Executive Director: Heidi Holly is a graduate of University of California at Santa Barbara with a degree in Behavioral Sciences. Ms. Holly has 28 years of experience working with the elderly population, and has been employed by Friendship Center since 1985.

Program & Family Services Director: Susan Forkush has a Bachelors degree in Sociology, a Masters degree in Public Health and a professional certificate in Geriatric Care Management. She has over 20 years of experience in implementing and managing community health programs and working as an organizational development consultant for local nonprofits.

Program Manager: Susan Jorgensen has a Bachelor's Degree in Anthropology from University of California at Santa Barbara; she has over 15 years of experience in adult day services management, and has taught adult education courses for the past 15 years. In addition, Ms. Jorgensen worked for many years as an advocate for people with developmental disabilities.

Goleta Program Coordinator: Melissa Alvarado received her Certified Medical Assistant credential from Santa Barbara City College. Ms. Alvarado has worked for seven years as a Medical Assistant with physicians in Santa Barbara and was the owner and operator for seven years of Helping Hands Senior Services in Carpinteria, providing non-medical home care.

**5. If full funding is not available through this request, how will you proceed? Please explain.**

If full funding is not available, Friendship Center may be forced to reduce hours for its onsite nurse, resulting in a diminished ability to serve its participants with increasing health issues. And for the H.E.A.R.T. Program, decreased funding would result in participants being asked to increase their contributions, a hardship for these low-income families. Most would no longer be able to benefit from our services if so.

**6. Is there any other pertinent information you feel we should know?**

Friendship Center's Board of Directors, staff, and stakeholders are embarking on the creation of a new 3-year strategic plan. One of the main goals of the most recent strategic plan was the launch of a new site, which has been accomplished. Experts stress that the most important outcome of strategic planning is to instill strategic thinking, which leads to strategic action. We believe this approach will enable us to better meet the challenges of a changing world as we move forward, and input from stakeholders will guide us in maximizing our positive impact in the community.

With nearly 9 months in operation, attendance at our Goleta site is growing all the time. Year to date, a total of 102 aging and dependent elders and their caregivers have been provided with services at Goleta, and average daily attendance is 18. We continue with outreach and marketing efforts in order to increase this census.

**Applicant name: Friendship Adult Day Care Center, Inc.**

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**Board of Directors/Governing Body**

**Directions:** Attach additional sheets if necessary.

Name	City	Affiliation/Profession	Board Position	Yrs. of Service
Marty Moore	Santa Barbara	Golf Course Supervisor	President	16
Inge Gatz	Santa Barbara	Social Worker	Vice President	3
Dana VanderMey	Santa Barbara	Prog. Mgr., Volunteer Svcs.	Secretary	3
Harvey Wolf	Santa Barbara	Attorney	Chief Financial Officer	4
David Borgatello	Santa Barbara	Business Owner	Member-at-large	6
Sue Adams	Santa Barbara	Community Volunteer		1
Karolyn Hanna	Santa Barbara	Professor of Nursing		1
Vangie Herrera	Santa Barbara	SBCC Adjunct Instructor		3
Mark Jackson, CPA	Goleta	Certified Public Accountant		1
Ken Jewesson	Santa Barbara	Artist & Teacher		4
Kathy Marden, MFCC	Santa Barbara	Psychotherapist		1
David Medina, MD	Santa Barbara	Retired Physician		1
Tony Mendesh, MD	Santa Barbara	Physician		4
Susan Plummer, MFT, Ph.D.	Santa Barbara	ED, Alliance for Living/Dying Well		1
Joanne Talbot, MFT, RN	Santa Barbara	MFT, RN		8
Carolyn Tulloh	Santa Barbara	Sr. VP, Dir. of Marketing		3

How often does the Board / Governing Body meet? 7 times per year, minimum

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Applicant Name: Friendship Adult Day Care Center, Inc.

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### Program or Capital Budget

Note: This form is not required for general support grant requests

Organization Name: Friendship Adult Day Care Center, Inc.

Program Name/Capital Request: H.E.A.R.T. (Help Elders At Risk Today) Program/Nurse Position

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Budget dates for grant period: 7-1-11 through 6-30-12

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Typically, total program income equals pending income + secured income.

#### **INCOME**

*Possible categories: Government grants, foundation grants, individuals, business support, events, fees for service, etc.*

Source	Total Program(\$)	Pending (\$)	Secured (\$)	Notes
Gifts/Grants	\$ 419,500.00	\$ 379,500.00	\$ 40,000.00	
Participant Contributions	\$ 150,000.00	\$ -	\$ 150,000.00	
Events/Donations	\$ 10,000.00	\$ 10,000.00	\$ -	
<b>TOTAL INCOME</b>	<b>\$ 579,500.00</b>	<b>\$ 389,500.00</b>	<b>\$ 190,000.00</b>	

List the In-Kind (non-cash) contributions: Volunteer time in assisting with and supporting program operations.

#### **EXPENSES**

*Possible categories: Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, etc.*

Item	Total Program(\$)	This Request (\$)	Notes
Salaries/Benefits	\$ 393,325.00	\$ 14,000.00	*Includes \$14,000 for nurse position salary
Travel/Training	\$ 4,700.00		
Consultants	\$ 5,250.00		
Building Costs	\$ 32,100.00		
Supplies/Postage	\$ 9,000.00		
Development	\$ 11,000.00		
Member Food	\$ 21,000.00		
Insurance/Accounting	\$ 26,200.00		
Program	\$ 13,750.00		
Vehicles	\$ 13,125.00		
Printing	\$ 5,250.00		
Publicity	\$ 11,550.00		
Misc.	\$ 3,150.00		
In-Kind	\$ 13,650.00		
Contingency	\$ 16,450.00		
<b>TOTAL EXPENSES</b>	<b>\$ 579,500.00</b>	<b>\$ 14,000.00</b>	



INTERNAL REVENUE SERVICE  
DISTRICT DIRECTOR  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: JUL 14 1979

FRIENDSHIP ADULT DAY CARE CENTER  
INC  
83 EUCALYPTUS LN  
SANTA BARBARA, CA 93108-2901

Employer Identification Number:  
95-3398938  
DLN:  
17053172705007  
Contact Person:  
D. A. DOWNING  
Contact Telephone Number:  
(513) 241-5199  
Our Letter Dated:  
November 1979  
Addendum Applies:  
No

Dear Applicant:

\_\_\_ This modifies our letter of the above date in which we stated that you would be treated as an organization that is not a private foundation until the expiration of your advance ruling period.

Your exempt status under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3) is still in effect. Based on the information you submitted, we have determined that you are not a private foundation within the meaning of section 509(a) of the Code because you are an organization of the type described in section 509(a)(1) and 170(b)(1)(A)(vi).

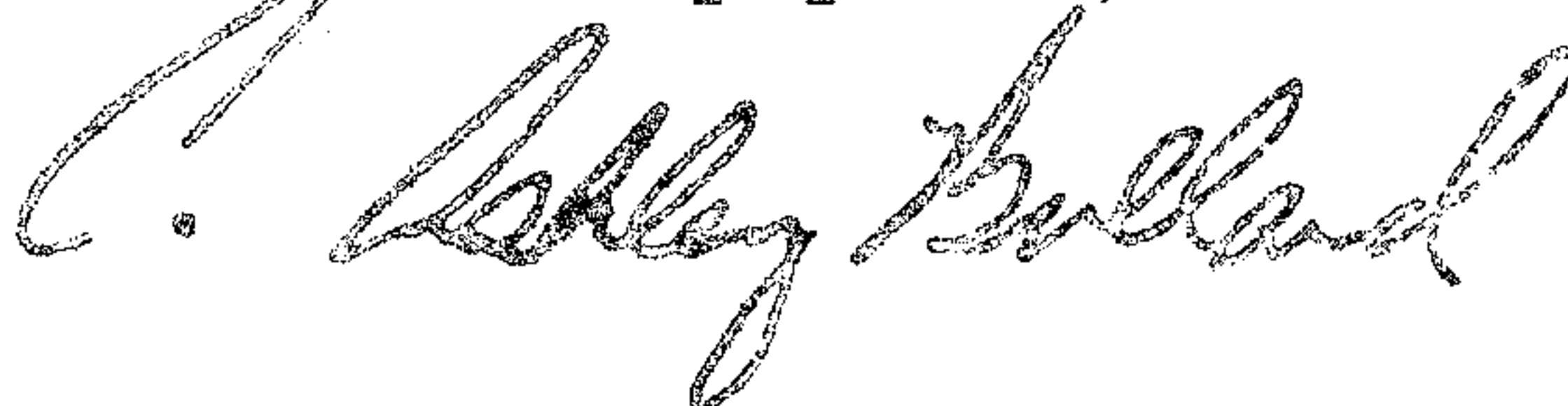
Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the act or failure to act, or the substantial or material change on the part of the organization that resulted in your loss of such status, or if he or she acquired knowledge that the Internal Revenue Service had given notice that you would no longer be classified as a section 509(a)(1) organization.

If we have indicated in the heading of this letter that an addendum applies, the addendum enclosed is an integral part of this letter.

Because this letter could help resolve any questions about your private foundation status, please keep it in your permanent records.

If you have any questions, please contact the person whose name and telephone number are shown above.

Sincerely yours,



District Director

## Friendship Center Report on Registered Nurse Position FY 11-12

Dear Trustees,

Friendship Center was awarded \$12,000 June 27, 2011 and is thankful for the continued generosity of the Saint Francis Foundation. The following is a report of how these funds supported our program for our dependent adult members and their caregivers:

- ✓ A registered nurse on staff enriches our day services and provides much-needed support for aging and dependent adults with chronic illnesses.
- ✓ The services of a nurse are essential in order to monitor medications and nutrition, as well as interfacing with physicians, creating care plans, and making health assessments of members.
- ✓ Our nurse supervises staff in administering medications, including PRNs, often a necessity for the members we serve with chronic health conditions.
- ✓ Caregivers are often reluctant to leave their loved-ones in adult day programs, but knowing there is a registered nurse on staff increases their peace of mind and the likelihood of enrollment to our program; therefore deterring costly long-term care.
- ✓ The St. Francis Foundation's funding covered 133 hours of professional nursing services by a registered nurse in FY11-12 to date.