

March 30, 2012

Debbie Cloud, Executive Director
St. Francis Foundation of Santa Barbara
2323 De La Vina St., Room 104
Santa Barbara, CA 93150-5580

Dear Ms. Cloud and Foundation Directors:

Thank you again for your grant of \$20,000 last year for our General Operations. We deeply appreciate your wonderful support over the years for our operating expenses.

We would like your consideration to fund our full grant request for \$30,000 this year. With this grant we can continue our emphasis on “recovery and empowerment” through a more active participation of clients in job training and paid work at the Recovery Learning Center (RLC), leading of classes by clients themselves, and the active contribution of their input in the classes and programs offered at the RLC, as well as membership on our Board of Directors. In addition, we have a new Employment Services Program (ES) for placement of jobs out into the community. This program promises to not only assist persons living with mental health disabilities to increase their incomes and facilitate their recovery, but also provides the Mental Wellness Center with sustainable program funding.

Our Board of Directors has increased their own donations for operating funds, and they have reached out to all their known contacts to help us in this time of cutbacks in governmental support – and we have redoubled our efforts to obtain foundation grants and donations from throughout California, and even out-of-state. Please note that there is a significant increase in our planned foundation grants and donations in our 2012 organization budget. This will provide for the growing demand for our services at the RLC to further the rehabilitation opportunities for our very low income clients, and the expenses of our new ES program. We hope the St. Francis Foundation will continue to join in this effort to help our organization reach a new level of sustainable growth and strength.

Please let us know if we can answer any questions or supply you with any additional information. We hope that our proposal meets with your approval, and look forward to hearing from you.

Sincerely,

Annmarie Cameron
Executive Director

Encl.: Report on 2011 Grant, and 2012 Common Grant Application request.

Report on the use of St. Francis Foundation grant funds in 2011

Thank you again for the very generous grant of \$20,000 from the St. Francis Foundation of Santa Barbara for general operating support of our organization last year. I would like to report on the use that we made of those grant funds during 2011:

1. At the Recovery Learning Center at the Fellowship Club (RLC), we provided safety net services to 205 very low income clients, including over 900 hours of Skills of Life classes and individual client sessions. We also served more than 13,000 meals for the year, and there were a total of over 13,500 visits by our clients to the club – plus transportation to and from the RLC for those who needed it. In spite of a reduced staff, we were able to achieve these results which exceeded our planned objectives by the use of volunteers including BOD participation, community volunteers, and client volunteers – and a staff that increased their work load and refused to turn away any clients who needed their help.
2. There were 39 homeless clients among the 205 total clients that we regularly served during the year at the RLC.
3. Our Family Advocates assisted over 300 family members with educational programs, advice, encouragement and referrals to help them in coping with the variety of challenges in dealing with the mental health disabilities of their loved ones.
4. We provided support services to 50 clients residing at our Garden Street Apartments and Eleanor Apartments independent living units.
5. New activities were monthly meetings at RLC to encourage input, questions and feedback on the center classes and activities, and similar monthly meetings for residents at the Garden Street Apartments, plus a new Spanish Support Group meeting twice a week for client family members who are more comfortable with discussions in Spanish led by our bi-lingual Family Advocate.
6. Employment Services Program (ES): This is an exciting new direction in services for our clients. In mid-2011, we established ES that allows people the dignity to support themselves and contribute to the economic growth of our community, rather than being fully dependent on governmental financial aid. This program grows our supported employment services to meet the extreme high demand from persons with mental health disabilities for vocational services programs at the Mental Wellness Center.

Cover Sheet

Funder you are applying to: St. Francis Foundation of Santa Barbara
 Legal Name of Applicant Organization: Mental Wellness Center (MWC)
 Contact Person & Title: Annmarie Cameron, Executive Director
 Phone: 884-8440 Fax: 884-8445 Contact Person's Email: amcsbmha@aol.com
 Program Name/Capital Request: General Operating Support
 Funds will pay for: A portion of staff salaries and operating expenses necessary to continue our safety net programs to our very low income clients and their family members
 Full Mailing Address: 617 Garden St., Santa Barbara, CA 93101
 Location(s) if different from above: _____
 Executive Director: Annmarie Cameron Email: amcsbmha@aol.com
 Fax: 884-8445 Phone: 884-8440
 Website: www.mhainsb.org

Tax-exempt Status: {Most funders require 501(c)(3) status. Check this requirement before applying}

501(c)(3) Granted Other: _____

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: \$30,000 Of Total Budget: \$1,527,154
 Funds will be used from: 1/1/12 To: 12/31/12
 Total Organizational Budget -Current Year: \$1,527,154 Agency fiscal year begins: 1/1/12

Summarize the organization's mission statement (two to three sentences):

The mission of the MWC is the advancement of mental wellness in Santa Barbara. We seek to facilitate the recovery of our clients, and to eradicate the stigma of mental illness by providing and ensuring appropriate care, services and support to adult persons with mental health disabilities and their families. We also promote a greater public awareness and understanding of mental health issues.

Summarize your grant request (two to three sentences):

This grant will help support our general operating expenses and retain our experienced staff. These core services include supervision and administration for the Recovery Learning Center at the Fellowship Club (RLC), support for the 50 units of low-income client housing on Garden Street and Eleanor Apartments, our new Employment Services program, our Board & Care home (Casa Juana Maria), Educational Programs, and our Family Services programs.

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:

<u>Nancy Chase, Secretary, Board of Directors</u>		<u>3/30/12</u>
Name of Authorized Board/Governing Body Representative	Title	Signature
		Date

<u>Annmarie Cameron, Executive Director</u>		<u>3/30/12</u>
Name of Lead Staff Member (or 2 nd Representative)	Title	Signature
		Date

Background

1. History and accomplishments: (for many years was known as the Mental Health Assn.)

The Mental Wellness Center (MWC) was founded in 1947 by a group of citizen volunteers in response to local mental health needs. The original focus was on public education and advocacy; however, over the years, the MWC has substantially broadened its mission to provide safety net services to clients and the community. In 2008, we opened our MWC on Garden Street - a Community Center to provide essential services including recovery and education programs, employment services, family services, and housing on an integrated downtown site for mental health needs here in Santa Barbara. We are a fully independent organization, but affiliated with the National Mental Health Association and the Mental Health Association of California.

2. Current programs and activities; constituency served, including demographics; how constituents benefit from our work, and how they are actively involved in our organization.

We serve over 1,400 clients and family members annually in all our programs. Client ages range from 18 to over 70; 2/3 male and 1/3 female; 68% Caucasian, 25% Latino/Hispanic, 5% Black, and 2% Asian and Native American. In most of our programs, our clients have very low incomes (about 25% are homeless), and they are on Social Security Disability Income (SSDI). Most clients have major mental health disabilities such as schizophrenia and bipolar disorders, are in long-term treatment, and on medication.

Recovery Learning Center at the Fellowship Club (RLC): A rehabilitation, self-help, and socialization center, open five days a week for classes, job training and employment, meals, outings, and transportation.

Employment Services include assessment, education, job prep and training opportunities, and job placement.

Housing Program: Three locations for 58 clients (two independent living buildings, and one board and care facility), plus a zero-interest loan program for those needing funds to move into independent living apartments.

Family Services Program & Family Support Groups: Reference service for clients' family members to sources of local services, as well individual support, guidance and information from our Family Advocates; monthly National Alliance on Mental Illness (NAMI) meetings; and weekly support groups for clients and their families.

Educational Programs: in the schools and at other community sites.

Advocacy: MWC advocates on a local and state level for increased funding for treatment, fair housing, and to fight the criminalization of the mentally disabled.

Client Involvement: Several client family members, and clients serve on our BOD. This provides invaluable input from and representation by those we serve. Some Board Members and family members are also active as instructors in our Family to Family Program. MWC clients also lead peer support groups, some of the classes at the RLC, as well as contribute in a variety of ways to RLC operations on a paid or volunteer basis.

3. Organization's relationships with other organizations working to meet the same need, and the way our work differs from that of other organizations.

MWC works closely with the S.B. County Department of Alcohol, Drug and Mental Health Services (ADMHS) and CA Dept. of Rehabilitation for both referrals and funding. Friendship Center Day Care serves the general senior population (some of whom suffer from dementia), and charges some fees. MWC offers a broader range of services than any of those organizations at no charge for all adults with chronic mental health disabilities.

1. Request for General Support.

*** Tell us *how* the funds will be used:**

We are applying for a grant award of **\$30,000** for staff salaries and associated expenses to help us continue to expand supportive services for the mental and physical wellness of our clients. Examples include diabetes management and nutrition information classes, and greater recreational and physical activities at the RLC. We also want to expand the opportunities for client's independence and participation leading to their rehabilitation and recovery. Examples here include an active role at the RLC in the development and leadership of classes, and more opportunities for volunteer and paid employment within our organization. In addition, our new Employment Services will continue to expand to place clients in outside jobs in Santa Barbara.

*** Why are you seeking general support at this time?**

Our staff is maximizing their efforts to work smarter and more efficiently – as well as placing great emphasis on cost controls. An example of these efforts is the food services at the RLC: we plan to provide 15,000 meals to individual clients at a total food cost of only \$6,000 – 40 cents a meal! We are able to do this by utilizing the local Food Bank, and bulk purchases at Costco. It is essential that we retain our experienced staff to provide this kind of attention to detail in our programs, while continuing to be sensitive to the needs of our clients and their families.

We also need to provide expanded core services for more than 200 clients at the RLC, and supportive services for the new 50 units of low-income housing on Garden Street, our Board & Care home, and the hundreds of family members we serve with our Family Advocates. Additionally, we need to expand our outreach to the community with our Educational Programs to enlighten people about mental illness, make them aware of the services we offer, and solicit their financial assistance to help us to continue our valuable services for clients.

For several years at the RLC, we have had a volunteer psychology graduate intern program through Antioch Univ., and 5 to 10 interns yearly provide individual attention, and help clients with life skills, education and job training advice and support, socialization, guidance and communication. The interns have been very helpful to our organization, but it is essential that our staff provide them with guidance and supervision to ensure their efforts are well directed and appropriate for our clients.

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 main goal of our organization is the empowerment and recovery from mental health disorders for our very low income clients. A central element of improved mental health is a purposeful life, which means the ability to actively participate and share with other people, and be involved in social and work situations where our clients can learn, grow, and reach their potential. Our organization seeks to assist and encourage this empowerment and recovery through educational and job training classes and employment, and supportive other services at the RLC, and with our housing and family services programs. During 2012, we will:

Objective #1: Provide services to over 200 clients at the Recovery Learning Center, including 800 hours of Skills of Life classes and individual sessions with clients who benefit from counseling. Included in these services will be 15,000 meals served, transportation to and from the club, and over 16,000 total visits to the club each year – all without charge to our indigent clients.

Objective #2: Assist in obtaining services for 35 homeless and indigent clients, including shelter, food, and medical care.

Objective #3: Provide information, support and advice to over 300 family members - via phone, in person, and classes - concerning various aspects of mental illness, coping with their family member's symptoms, medication management, financial issues, & dealing with governmental offices and medical staff.

Objective #4: Provide independent living housing support services to a total of 50 clients at our Garden Street Apartments and the Eleanor Apartments.

Objective #5: For the ES Program, we will assess 120 individual client's goals and capabilities yearly; set up educational and training opportunities to develop job skills for 110 clients; teach job readiness preparation for 48 clients, and secure job placement in the community for 44 clients.

Timeline for this grant: January 1, 2012 – December 31, 2012

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

Our Executive Director and Director of Operations monitor all aspects of the RLC, Family Advocate, and housing programs with regular scheduled monthly staff meetings and written reports, and other consultations as any issues of those activities arise, and to see that suitable progress is being made throughout the year in our core programs. Suitable progress is evaluated in terms of attendance and participation in classes at the RLC (including leading of classes), ability of clients to learn job skills and perform both volunteer activities and some paid work in maintenance at the RLC and administrative offices, clerical tasks, and assistance in the kitchen of the RLC.

Our Employment Services Program is modeled on other programs with high success rates throughout the state. The Leader of the Employment Services project reports to our Director of Operations on a weekly basis about the progress towards our goals as detailed in the program design and activities specified above, and how we compare to those other programs.

Our financial goals are set in the budget for each year, and we monitor monthly our progress towards those income and expense projections. Various committees of the BOD such as Fund Development, Education, Finance, etc. develop plans and specific goals for our organization based on precedents and new directions for our staff to implement.

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.

Anmarie Cameron, Executive Director, has 23 years experience as a professional program administrator in community mental health, with 20 of those years as Executive Director of the MWC. She holds a B.S. in Family Studies. For five years, Mrs. Cameron has been a board member of the Housing Trust Fund of Santa Barbara County. She is also a board member of the California Council of Community Mental Health Agencies. Throughout her career as Executive Director, she has been an effective role model, team player and motivator for her staff, and she has been an outstanding "public face" in community presentations and other meetings with public and private agencies and foundations.

Patricia Collins, Director of Operations, MS in Quality Assurance, has 20 years experience in social services, and 18 years in management with similar skills to our Executive Director.

Rachael Novoa, Employment Services Leader, has 15 years of wide-ranging business experience in worker recruitment and placement, and 10 of those years as a senior manager and sole business proprietor, with excellent interpersonal communication skills, as well as knowledge of current labor laws.

Numerous volunteers and our Board of Directors are instrumental in the success of our organization. Our BOD is very helpful due to their diverse backgrounds and extensive professional experience. Several of our board members and other volunteers have family members with mental health disabilities, and thus they are highly motivated to help our association financially. They also provide valuable input in all our programs, as well as with fund raising events and community contacts.

Collaborating Organizations: We work in close association with the S.B. County Department of Alcohol, Drug, and Mental Health Services (ADMHS) and the CA Dept. of Rehabilitation for referrals and funding. ADMHS makes client referrals to the RLC and to our residential program; we also coordinate with ADMHS on clients who have joint substance abuse and mental disability issues.

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

St. Francis Foundation of Santa Barbara grant funds are very important as a significant portion of the increased support needed for us to sustain our operations in 2012. Santa Barbara County provided 65% of the funding for our entire organization for many years in the past, but this currently dropped to about 35%, and is unlikely to rise in the future. As can be seen on our attached organization budget, we are making a major effort to secure more donations and foundation grants this year to support our urgently needed programs for our vulnerable clients. Without St. Francis Foundation full grant funds or a reduced amount, we may have to cut back on the number of clients served, and/or reduce staff hours, or reduce other organization services later this year.

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

On February 29, 2012, we changed our name to the Mental Wellness Center, in keeping with our goals and strategies these past few years that focus on direct involvement and participation of our clients towards their recovery, and the services we offer to the broader community.

Mental illness impacts not only the individuals involved, but their families and our community as well. Santa Barbara sees the effect on public streets, police, jail and court involvement, hospitals, and governmental agencies at the city and county level. For example, when people with mental health disabilities do not have our support to stay on medications, and when they cannot access our welcoming programs at the RLC, they may encounter difficulties out in public and risk being incarcerated without help or treatment. Clients may also become socially isolated and risk intensification of their symptoms that will result in expensive and difficult hospitalizations. If we have to cut back on our services due to limited financial resources, there is little doubt that increased costs and other business and societal issues will negatively impact our communities in dealing with persons with mental health disabilities.

Our vulnerable clients urgently need the safety net services offered at the Recovery Learning Center at the Fellowship Club, which provides a continuum of services, care and emotional support to facilitate their recovery and empowerment, and enable them to live independently and remain stable. Low-income housing is in very short supply in Santa Barbara, especially for our clients - so our new affordable housing complex, the Garden Street Apartments, with 50 units meets a very crucial need in the city. In addition, the services we offer with our Family Advocates, support groups, and our Family to Family educational classes are essential in helping our clients and their family members cope with the problems associated with mental illness.

**Mental Wellness Center
2012 Board of Directors**

Name	City	Affiliation/Profession	Board Position	Yrs. of Service
Antoinette G. Amorteguy	S.B. 93108	Designer Publisher		2
Bruce Anticouni	S.B. 93108	Attorney		2
Deborah Boswell	S.B. 93101	Attorney		1 st year
Andrea Carnaghe	Carpinteria 93013	Accountant		1 st year
Nancy Chase	S.B. 93111	Freelance musician/member of the SB Symphony	Secretary	15
Bill Clinkenbeard	S.B. 93121	Civil Litigation Attorney		1 st year
Joe Cooper	S.B. 93105	Director of Operations, Private Co.		1 st year
Bonnie Corman, Ph.D.	S.B. 93108	Psychologist		5
Jane Macedo de Veer	S.B. 93108	Insurance Agency Owner		6
Karel de Veer	S.B. 93108	Property Management	Treasurer	6
Ned Emerson	S.B. 93103	Retired Sales and Business Executive	Vice President	3
Anne Greaney, R.N.	S.B. 93110	Community Volunteer		5
Chad Hine	S.B. 93111	Financial Executive		1 st year
George Kaufmann	S.B. 93108	Retired Pharmaceutical Marketing Exec.		11
Darcy Keep, R.N.	S.B. 93101	Nursing Dir., Psych. & Chem. Dep. Unit, Cottage Hosp.		11
Ann Lippincott, Ph.D.	S.B. 93101	Assoc. Dir., Teacher Ed. Program, UCSB	President	6
Tom Mullaney	S.B. 93108	Retired Business Executive		6
Edward J. Mullen	S.B. 93108	Senior Partner Healthcare Recruitment		2
Kelly Rau	S.B. 93108	Community Volunteer		6
Katrina Soltero	Carpinteria 93014	Elementary School Teacher		2
Maria Valencia	S.B. 93101	Licensing Program Mgr., State of CA		2
Robert Young	S.B. 93108	Residential Building Contractor		7

How often does the Board / Governing Body meet? Monthly

Organization Financial Summary

Organization Name: Mental Wellness Center

Fiscal Year Dates: 1/1/12 – 12/31/12 Operations Budget

INCOME (majority of income sources are expected to be received in the second half of the year)

Source	Prior Year's Actual (\$) [12/31/11]	Projected Annual 2012 Budget (\$)	YTD Actual (\$) [2/29/12]
Donations	392,781	238,776	17,696
Operating Grants	278,368	390,000	29,000
Bequest	970,644		Adjustment 18,910
S.B. County Contracts	576,890	591,720	104,458
Board & Care Contracts	67,185	64,500	11,692
CA Dept. of Rehab.		66,996	2,383
Fee for Service	32,358	60,000	40,100
Rental Income	93,928	102,060	17,906
Garden St. Apt. Management	24,094	32,616	2,695
Developer fee – Garden St.		70,380	
Condo Assoc. Mgmt. Fee	17,580	17,580	
Miscellaneous Income	11,583	27,996	2,504
TOTAL INCOME	2,465,411	1,662,624	247,344

In-Kind (non-cash) contributions: Over 100 volunteers (22 on the BOD) devote in excess of 5,000 hours a year at BOD and committee meetings, writing our newsletter, and helping with fund raising special projects. In addition, volunteers and board members teach classes at the Recovery Learning Center, counsel/advise clients, make community presentations, donate and serve food, decorate and socialize at holiday parties, and write to and meet with state and local officials.

EXPENSES

Item	Prior Year's Actual (\$) [12/31/11]	Annual Budget (\$) For 2012	YTD Actual (\$) [2/29/12]
Salaries	726,043	841,080	117,690
Payroll Costs	147,958	212,880	37,733
Rent	190,582	190,692	31,782
Food	38,308	23,760	6,484
Supplies	25,853	28,800	4,733
Telephone & Utilities	38,775	43,608	9,452
Repairs/Maintenance	37,080	12,588	4,797
Transportation & Travel	8,194	10,716	1,157
Equipment/Furnishings	25,530	6,996	14,994
Insurance	25,657	27,264	4,544
Printing & Postage/Shipping	18,846	20,616	3,825
Professional Services	57,585	47,004	12,979
Training	9,546	13,080	31,126
Affiliations/NAMI/Dues & Subscriptions	12,651	7,656	1,242
Special Projects & Events	3,736		
Depreciation	40,429	9,996	1,666
Operating Reserve		2,500	
Interest Expense	12,336	23,370	1,479
Miscellaneous	6,597	4,548	2,945
TOTAL EXPENSE	1,425,706	1,527,154	288,628
NET PROFIT / (LOSS)	\$1,039,705	135,470	(-41,284)
Capital Expenses	25,530	6,996	14,994

Explanatory notes: There were two events in 2011 that accounted for the very large Net Profit that year: 1. We had a special fund raising lunch that provided \$196,675 in income (included in Donations – but were actually pledges for the next five years), and 2. A special Bequest resulted in income of \$970,644 when our benefactor passed away. The large income was used to pay down a portion of our indebtedness for the construction of the new Mental Wellness Center.

Mental Wellness Center - Organization Balance Sheet Summary

<u>ASSETS</u>	MOST CURRENT (\$) [as of 2/29/12] <u>unaudited</u>	PRIOR YEAR CLOSE (\$) [12/31/11] <u>unaudited</u>
Current Assets		
Cash and Equivalents	327,444	367,702
Contracts Receivable	61,483	106,608
Accts. Receivable	118,303	119,171
Other current assets	26,878	39,788
Total Current Assets	534,108	633,269
Fixed Assets		
Property/Land	512,000	512,000
Buildings & Improvements	301,655	301,655
Furniture & Equipment	259,362	259,362
Vehicles	88,248	88,248
Accumulated Depreciation	-308,951	-307,285
Net Fixed Assets	852,314	853,980
Investments/Other Assets		
Advances to MWC Garden St. Apts.	2,113,688	2,113,688
Developer Fee Rec.	747,433	747,433
Permanently Restricted Invest.	53,727	53,727
Pledges Rec. (Non-current)	128,925	128,925
Inv. in Bldg. Hope LLC	1,932,343	1,932,343
Additional Construction Costs	361,509	361,509
Rec. from Bldg. Hope I & II	2,059,675	2,059,675
Total Other Assets	7,397,300	7,397,300
TOTAL ASSETS	8,783,722	\$8,884,549
<u>LIABILITIES</u>		
Current Liabilities		
Accounts Payable	32,542	14,705
Accrued Expenses	27,707	42,299
Security Deposits	13,362	13,362
Payroll Liabilities (Net)	7,772	1,785
Deferred Income	8,333	8,333
Current portion of l/t debt	9,501	9,501
Total Current Liabilities	99,217	89,985
Long Term Liabilities		
Notes Payable	271,218	272,923
Deferred Income	170,139	170,139
Loan Payable	357,000	357,000
Total Long Term Liabilities	798,357	800,062
TOTAL LIABILITIES	897,574	890,047
Net Assets		
Unrestricted (incl. retained earn.)	7,689,615	7,797,969
Temporarily Restricted	150,000	150,000
Permanently Restricted	46,533	46,533
Total Net Assets	7,886,148	7,988,055
TOTAL LIABILITIES AND NET ASSETS	\$8,783,722	\$8,884,549