

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 salary for onsite Registered Nurse; partial funding of H.E.A.R.T. 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: _____

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: \$557,000

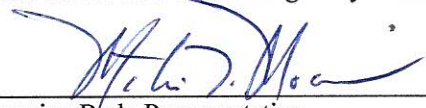
Funds will be used from: July 1, 2013 To: June 30, 2014

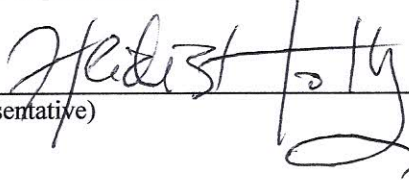
Total Organizational Budget -Current Year: \$1,235,000 Agency fiscal year begins: July 2013

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 the dignity and worth of every person. We provide respite, support and education, enabling families to continue to be engaged their community, careers and commitments.

Summarize your grant request (two to three sentences):
The requested amount of \$20,000 will enable Friendship Center to continue providing the services of an onsite registered nurse at both sites, a vital component of the adult 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  3-21-13
Name/ Title of Authorized Board/Governing Body Representative Signature Date

Heidi Holly, Executive Director  3-19-13
Name/ Title of Lead Staff Member (or 2nd Representative) Signature Date

Friendship Center Report on Registered Nurse Position FY 12-13

Dear Trustees,

Friendship Center was awarded \$12,000 May 29, 2012 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 400 hours of professional nursing services by a registered nurse in FY12-13 to date.

March 20, 2013

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

Dear Trustees,

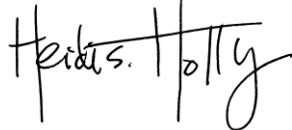
On behalf of Friendship Center's Board of Directors, staff and most importantly, the members we serve, we thank you for the Foundation's ongoing generosity in supporting our program.

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 'H'.

Heidi Holly
Executive Director

HH/js

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.

In FY11-12, Friendship Center's average daily attendance was 48. Over 36,285 meals and snacks were served. Over 84,455 hours of adult day services were provided, with over 211,145 hours of respite for family members and caregivers. It is important to remember that for each program participant, an average of 2.5 caregivers benefit from the services 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 greatly benefits the community as the only non-profit adult day services program in Southern Santa Barbara County. We provide professional, compassionate, and affordable care, working with each family to arrive at a daily rate based on their income level. Friendship Center collaborates with other programs serving dependent elders in Santa Barbara County, sharing our resources and enjoying positive relationships with All Saints-by-the-Sea Episcopal Church, Live Oak Unitarian Universalist Congregation, Alzheimer's Association, Santa Barbara Food Bank, Food from The Heart, Community Action Commission, Santa Barbara City College, Easy Lift Transportation, Santa Barbara County Adult Protective Services, Visiting Nurse and Hospice Care, and Coast Caregiver Resource Center. We strongly believe in collaboration in order to better use available resources for dependent elders and enhance the positive impact of all services.

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. For the first time last year, part of our grant was designated 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. We ask that this program be funded again this year..

- **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. 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.

Our onsite registered nurse's hours are part-time and divided between the two sites. However, for the aging and dependent adult participants in Friendship Center's day 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. This enables those in need of day services to benefit from the care, respite, and support available even if they and their families are unable to pay the full daily fee. Many of these families' economic situations have worsened in the recent recession. The Center's costs have increased dramatically in the past few years, and the average member contribution covers just 44% of the \$95 per day, per member cost of operations. Friendship Center strives to continue providing affordable day services for those in need, and to do so, support from the community is crucial.

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

The majority of members have Alzheimer's disease, while others have related cognitive disorders or conditions related to aging, with an increasing number of developmentally disabled adults as this population ages. Ages range from 55 to 99; 58% are female, 42% male. 83% are Caucasian, 12% are Latino; 3% are Asian/Pacific Islander; 2% are African-American; 83% 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 50% are members of the "sandwich generation"— adult children with full-time 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 said they 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. According to the Wall Street Journal, the number of citizens over the age of 80 will more than double in the next 25 years as the Baby Boomers age, and 50% of those will be diagnosed with symptoms of dementia or Alzheimer's.

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. She has 29 years of experience working with the elderly population, and has been employed by Friendship Center since 1985. She currently is a member of the Adult & Aging Network and a certified teacher of California Community Colleges, as well as having served on Boards related to seniors and social services.

Family Services Director: Jackie Kennedy has a Bachelor's degree in Community Health Education, a Master's degree in Education with an emphasis in Health Promotion and a Certificate in Gerontology. In Nevada, Jackie was first Health Educator, then Executive Director for the Susan G. Komen Foundation.

Program Manager: Susan Jorgensen has a Bachelor's Degree in Anthropology from University of California at Santa Barbara; she has over 16 years of experience in adult day services management.

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.

Nurse: Lynn Whitaker is a graduate of California State University at Humboldt and has worked as a registered nurse since 1992 at multiple locations, including Cottage Hospital, Santa Barbara Outpatient Surgery Center, and Sansum Clinic.

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?

It is important to maintain the sustainability of our program, as it provides an important "safety net" for the most vulnerable members of our population--aging and dependent adults. Participant fees cover less than half the costs of day-to-day operations of our Centers. Therefore, it is necessary to continue to seek funding from individual gifts and grants and from other fundraising efforts. We are currently assembling an auxiliary speakers' bureau of former caregivers to make presentations to groups, to "tell their stories," about the benefits of Friendship Center to them and their families. Our vision is that not only will Friendship Center become a "household word," but that all in need of our services will make use of them in order to improve their quality of life.

Applicant Name: Friendship Adult Day Care Center, Inc.**Organization Financial Summary****Note:** Check with each funder to see if this form is required

Organization Name: Friendship Adult Day Care Center, Inc.

Fiscal Year Dates 07/01/11 to 06/30/12 07/01/12 to 06/30/13 07/01/12 to 12/31/12

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

Source	Prior Year's Actual (\$) 07/01/11 to 06/30/12	Projected Annual Budget (\$) 07/01/12 to 06/30/13	YTD Actual (\$) 07/01/12 to 12/31/12
Gov. Grants	\$ 67,024.00	\$ 67,300.00	\$ 35,278.00
United Way	\$ 8,000.00	\$ 7,000.00	\$ 5,500.00
Foundations	\$ 218,162.00	\$ 220,000.00	\$ 146,000.00
Trusts/Tributes	\$ 8,041.00	\$ 4,500.00	\$ 5,850.00
Fundraising	\$ 41,989.00	\$ 37,700.00	\$ 26,897.00
Special Events	\$ 105,922.00	\$ 107,000.00	\$ 36,803.00
Part. Contributions	\$ 641,329.00	\$ 708,000.00	\$ 294,049.00
Other Gifts/Grants	\$ 5,225.00	\$ 6,000.00	\$ 11,495.00
End. Cont./Beqsts			
Interest /Dividends	\$ 51,841.00	\$ 12,500.00	\$ 41,158.00
Other - In-kind	\$ 29,750.00	\$ 25,000.00	\$ 12,925.00
Invest loss/Intrfnd trnsfrs	(178,605.00)	\$ 6,500.00	68,489.00
TOTAL INCOME	\$ 998,678.00	\$ 1,201,500.00	\$ 684,444.00

List the In-Kind (non-cash) contributions: \$0

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

Item	Prior Year's Actual (\$) 07/01/11 to 06/30/12	Annual Budget (\$)	YTD Actual (\$)
		07/01/12 to 06/30/13	07/01/12 to 12/31/12
Salaries & ERE	\$770,785.00	\$ 750,000.00	\$335,145.00
Staff Travel/Trnng	\$4,387.00	\$ 8,000.00	\$1,710.00
Consltns/MOakly.	\$15,094.00	\$ 25,500.00	\$5,205.00
Advrtsng/Prntng	\$55,334.00	\$ 62,500.00	\$19,378.00
Telephone/Utilities	\$20,353.00	\$ 19,000.00	\$8,315.00
Ins/Acctng/Adtg	\$68,383.00	\$ 74,000.00	\$33,672.00
Office Sppls/Pstge	\$18,879.00	\$ 20,000.00	\$6,574.00
Vehicles	\$17,211.00	\$ 24,000.00	\$7,994.00
Rent/R&M/Equip	\$71,181.00	\$ 79,000.00	\$34,946.00
Prgm Supplies/Food	\$84,580.00	\$ 104,000.00	\$34,893.00
Misc/Depreciation	\$87,444.00	\$ 10,500.00	\$34,932.00
In-kind	\$29,750.00	\$ 25,000.00	\$12,925.00
TOTAL EXPENSES	\$ 1,243,381.00	\$ 1,201,500.00	\$ 535,689.00
NET PROFIT OR LOSS	\$ (244,703.00)	\$ -	\$ 148,755.00
Total Capital Expenses	\$ -	\$ -	\$ -

i.e., computers, vehicles, building improvements, etc:

Explanatory Notes: Excess funds include temporarily restricted funds for operations and expansion.

Applicant Name: Friendship Adult Day Care Center, Inc.**Organization Balance Sheet Summary****Note:** Check with each foundation to see if this form is required.

	MOST CURRENT (\$)	PRIOR YEAR CLOSE (\$)
ASSETS	[12/31/12] (date)	[06/30/12] (date)
Current Assets		
Cash and Equivalents	\$ 332,973.00	\$ 265,071.00
Accounts Receivable	\$ 46,046.00	\$ 63,395.00
Prepaid Expenses	\$ 30,109.00	\$ 21,989.00
Inventory		
Grants/Pledges Receivable	\$ 26,424.00	\$ 12,285.00
Other: Interest Receivable	\$ 15,571.00	\$ 14,916.00
Fixed assets (Net)		
Property	\$ 62,390.00	\$ 92,076.00
Buildings		
Equipment	\$ 9,339.00	\$ 10,958.00
Investments		
Endowments	\$ 1,776,104.00	\$ 1,717,083.00
Other: Operating	\$ 762,045.00	\$ 719,487.00
TOTAL ASSETS	\$ 3,061,001.00	\$ 2,917,260.00
LIABILITIES		
Current Liabilities		
Accounts Payable	\$ 15,252.00	\$ 17,605.00
Accrued Expenses	\$ 73,408.00	\$ 76,069.00
Long Term Debt (Current Portion)		
Short Term Debt		
Other:		
Long Term Debt (over a year)		
Loan		
Other:		
TOTAL LIABILITIES	\$ 88,660.00	\$ 93,674.00
NET ASSETS		
Unrestricted	\$ 1,943,124.00	\$ 1,826,736.00
Temporarily Restricted	\$ 407,568.00	\$ 375,201.00
Permanently Restricted	\$ 621,649.00	\$ 621,649.00
TOTAL LIABILITIES		
AND NET ASSETS	\$ 3,061,001.00	\$ 2,917,260.00

Applicant Name: Friendship Adult Day Care Center, Inc.

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

Budget dates for grant period: 7-1-12 through 6-30-13

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	\$ 412,000.00	\$ 380,000.00	\$ 32,000.00	
Participant Contributions	\$ 135,000.00	\$ -	\$ 135,000.00	
Events/Donations	\$ 10,000.00	\$ 10,000.00	\$ -	
TOTAL INCOME	\$ 557,000.00	\$ 390,000.00	\$ 167,000.00	

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	\$ 384,000.00	\$ 14,000.00	*Includes \$14,000 for nurse position salary
Travel/Training	\$ 4,000.00		
Consultants	\$ 4,000.00		
Building Costs	\$ 32,000.00		
Supplies/Postage	\$ 8,000.00		
Development	\$ 10,000.00		
Member Food	\$ 18,000.00		
Insurance/Accting	\$ 26,000.00		
Program	\$ 13,000.00		
Vehicles	\$ 13,000.00		
Printing	\$ 5,000.00		
Publicity	\$ 11,000.00		
Misc.	\$ 3,000.00		
In-Kind	\$ 10,000.00		
Contingency	\$ 16,000.00		
TOTAL EXPENSES	\$ 557,000.00	\$ 14,000.00	

**Friendship Center Board of Directors/Governing Body
FY12-13**

Name	City	Affiliation/Profession	Board Position	Yrs. of Service
Marty Moore	Santa Barbara	Golf Course Supervisor	President	17
Sue Adams	Santa Barbara	Community Volunteer	Vice President	2
Dana VanderMey	Santa Barbara	Prog. Mgr., Volunteer Svcs.	Secretary	4
Harvey Wolf	Santa Barbara	Attorney	Chief Financial Officer	5
David Borgatello	Santa Barbara	Business Owner	Member-at-large	7
Marti Correa de Garcia	Santa Barbara	Businesswoman		1
Inge Gatz	Santa Barbara	Social Worker		4
Jared Green	Santa Barbara	Attorney		1
Karolyn Hanna	Santa Barbara	Professor of Nursing		2
Mark Jackson, CPA	Goleta	Certified Public Accountant		2
Ken Jewesson	Santa Barbara	Artist & Teacher		5
Kathy Marden, MFCC	Santa Barbara	Psychotherapist		2
David Medina, MD	Santa Barbara	Retired Physician		2
Tony Mendesh, MD	Santa Barbara	Physician		5
Susan Plummer, MFT, Ph.D.	Santa Barbara	ED, Alliance for Living/Dying Well		2
Joanne Talbot, MFT, RN	Santa Barbara	MFT, RN		9
Karen Telleen-Lawton	Santa Barbara	Writer/Financial Advisor		1

How often does the Board / Governing Body meet? Every month except February & August; 10 times per year

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

DEPARTMENT OF THE TREASURY

Date: JUL 14 1997

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).

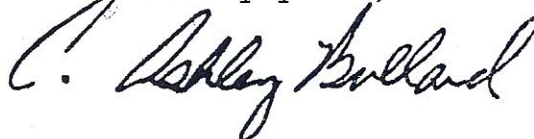
Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the 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

Letter 1050 (DO/CG)