

The Foundation Roundtable: Common Grant Application

Cover Sheet

Foundation you are applying to: St. Francis Foundation of Santa Barbara
Legal Name of Applicant Organization: Jodi House, Inc.
Project Name (if applicable): General Operating Support
Funds will pay for: The continuation and improvement of our current programs
Full Mailing Address: 625 Chapala St. Santa Barbara, CA 93101
Location(s) if different from above: _____
Executive Director: Eryn Eckert, PhD
Phone: (805) 563-2882 ext. 6 Fax: (805) 563-3982
Email: eryn@jodihouse.org Website: www.jodihouse.org
Contact Person & Title: Lia Manfredi, Development Coordinator Phone: (805)563-2882 ext. 4

Tax-exempt Status:(Most foundations require 501(c)(3) status. You must check this requirement before applying.)

501(c)(3) Granted Tax I.D. Number: 95-3836137 Other: _____

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

General Support Program Support Seed Funding Research

Capital Endowment Multi-Year Other: _____

This Grant Request: \$ 10,000 Total Project Budget: \$ 264,305.78

Grant Period from: July 1, 2014 To: June 30, 2015

Total Organizational Budget for Current Year: \$ 264,305.78 Fiscal year begins: July 1

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

Jodi House empowers brain injury survivors and their families to reconnect, rebuild, and move forward together within our community.

Summarize your grant request (two to three sentences):

Jodi House respectfully requests \$10,000 from the St. Francis Foundation to support our Clubhouse Day Program, Resource and Referral Program, and Immersion Services Program. This funding will allow Jodi House to continue our current services while also targeting specific outreach to the underserved in our community.

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:

Gayle Cummings Co-President, BOD Gayle Cummings 03/21/14
Name & Title of Authorized Board/Governing Body Representative Signature Date

Eryn Eckert, PhD Executive Director Eryn Eckert 3/21/14
Name & Title of Authorized Board/Governing Body Representative Signature Date

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Board of Directors/Governing Body

Directions: Attach additional sheets if necessary.

Name	City	Affiliation/Profession	Board Position	Yrs. of Service
Tim Morton-Smith	Santa Barbara	Partner, Pacific Pointe Advisor	Co-President/ Vice President of Finance	3
Gayle Cumming	Santa Barbara	Retired Educator, Psychologist	Co-President	1.75
Stephanie Bourmediene	Goleta	MPH	Vice President	1.75
Nicole Flynn Steward	Santa Barbara	Marketing Professional	Board Member	New
Andrew Chung	Santa Barbara	Vice President, Bank of Santa Barbara	Board Members	11.5
Patti Teel	Summerland	Radioshow Host	Board Member	0.5
Jennifer Lovette	Santa Barbara	VP Communication, Commission Junction	Board Member	1.25
Stephen Kaminski	Santa Barbara	Medical Doctor, Surgical Critical Care	Board Member	4 months
Chris Janeway	Santa Barbara	Financial Advisor, PlanMember	Board Member	New

How often does your governing body meet? Bi-monthly

The Foundation Roundtable: Common Grant Application

Project Budget

Note: Check with each foundation to see if this form is required.

Organization Name: Jodi House, Inc.
 Name of Project (if different): General Operating Support
 Budget dates for grant period: July 1, 2014- June 30, 2015

INCOME

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

Source	Total Project (\$)	Pending (\$)	Secured (\$)	Notes
Direct Contribution	51851.33	0	92664.70	
Other Grants	189889.45	94814.45	95075.00	
Interest/Dividend	565	0	1317.80	
Event	12000	12000	0	Walk for Brain Injury
St. Francis	10000	10000	0	
TOTAL INCOME	264305.78	116814.45	189057.5	

List the In-Kind (non-cash) contributions: Volunteers: lead activities, spend time with members, administrative and event help.

EXPENSES

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

Item	Total Project (\$)	This Request (\$)	Notes
Salaries/Wages	191774.00	6500	Program staff time to work with members and do community outreach
Operations	28382.78	1500	Facility supplies and utilities
Program	24974.00	1500	Brochures for education and outreach, contractors to work with members
Other	19175.00	500	Staff training at community seminars and mileage
TOTAL EXPENSES	264305.78	10000	

The Foundation Roundtable: Common Grant Application
Organization Financial Summary

Note: Check with each foundation to see if this form is required.

Organization Name: Jodi House, Inc. Fiscal Year Dates: July 1-June 30

INCOME

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

Source	Prior Year's Actual	Projected Annual Budget (\$)	YTD Actual (\$) as of [03/17/14]
Direct Contributors	69873.96	51851.34	92664.70
Grants	156298.54	199889.44	95075.00
Interest/Dividends	1020.53	565	1317.80
Special Events	13000	12000	0
TOTAL INCOME	240193.03	264305.78	189057.5

List the In-Kind (non-cash) contributions: _____

EXPENSES

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

Item	Prior Year's Actual	Annual Budget (\$)	YTD Actual (\$) as of [03/17/14]
Salaries and Wages	247396.07	191774.00	130415.76
Operations	2891.76	10380	6783.84
Contract Services	10707.69	7779.78	9506.06
Facilities and Equipment	9711.78	10223	6308.58
Travel and Meetings	548.22	600	1026.54
Department of Rehabilitation	9001.07	0	0
Program Expenses and Marketing	27631.14	24974	23428.89
Staff Development/Other	12790.40	13325	12296.76
Business Expenses	5350.46	3250	1798.96
Event Expenses	12814.23	2000	0263.67
TOTAL EXPENSE	338842.82	264305.78	191829.06
NET PROFIT OR LOSS	-98649.79000000001	0	-2771.559999999977

Total Capital Expenses			
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i.e., computers, vehicles, building improvements, etc.:

Notes:

Jodi House, Inc.
2013 Grant Narrative

Organization Background

History and Accomplishments

Jodi Wustman was hit by a drunk driver in 1982 when she was 19 years old. After her family was unable to find suitable resources for adult brain injury survivors in Santa Barbara County, they got together with family members of other brain injury and stroke survivors to start a weekly support group. As the group continued to grow, they began adding more programs and in 1994, Jodi House gained a physical location in Santa Barbara. Since then, we have continued to expand our services, provide a greater variety of activities and support groups, and outreach to more people in our area. In 2006, we opened our weekly program in Buellton in order to increase our impact in the county. In the past 32 years, Jodi House has developed from a weekly support group to a model resource for survivors of traumatic brain injury (TBI), stroke, aneurysm and tumor.

Over the past year, we are proud to have provided over 7,500 hours of service to 140 members, and resources and information to over 275 family members and caregivers. As Jodi House continues to improve current programs and develop new, research-based programs, we are able to assist more people affected by brain injury in Santa Barbara County.

Programs, Activities and Constituency

Jodi House operates four programs, the Santa Barbara Jodi House Program, the Santa Ynez Valley Jodi House Peer Support Program, Resource & Referral Program, and the Immersion Services Program. Both the Santa Barbara and the SYV Jodi House programs are supportive, community-based programs, consisting of structured activities that facilitate community re-integration. Opportunities at the Santa Barbara and SYV Jodi House include groups that promote social and emotional support, activities that enhance speech and communication skills, movement and nutrition classes, and healthy cooking and budgeting classes. Participants of the Immersion Services Program (ISP) work through independent assignments, one-on-one assistance, and community outings to complete the ten competencies of the program: Personal Profile, Career Goals, Resume, Job Application, Transportation, Personal Appearance, Job Search, Interviewing Skills, Employer Expectations, and Customer Service. ISP is specifically designed to assist brain injury survivors learn the skills needed to gain meaningful employment or volunteer positions and is a collaborative effort with the state of California Department of Rehabilitation. The Resource & Referral Program serves family members and caregivers of Jodi House members, and the community at-large to provide information and support regarding stroke and TBI and link them to various agencies that provide mental wellness, continued medical care and rehabilitation, vocational resources, social services and education programs.

Jodi House members range from 19-89 years old with an average age of 54. 48% of members have survived a traumatic brain injury, 33% are stroke survivors and 4% have experienced an aneurysm. 68% of members are unemployed, most rely solely on SSI or SSDI for income, and 73% report an annual income of less than \$20,000 a year. Survivors periodically evaluate each class that we offer and our staff uses those results to improve the calendar to introduce new classes and continue those that have the most impact. Additionally, once a month we hold an open session with the Executive Director where members are free to provide suggestions and concerns regarding the program.

Organization Relationships

Jodi House has formed a strong partnership with the state Department of Rehabilitation through the development of the Immersion Services Program. In addition, we have close relationships with a variety of organizations in the community including, but not limited to, Easy Lift Transportation, PathPoint, Coast Caregiver Resource Center, Independent Living Resource Center, The Braille Institute, In Home Supportive Services, and Cottage Rehabilitation Hospital. We frequently refer our

members to their services and are referred members in return. These relationships allow us to best serve brain injury survivors in our area.

Funding Request

Problem our Project Addresses

Brain injuries do not discriminate based on age, race, or previous health history. The effects of a brain injury last a lifetime. In addition to impairments in vision, hearing, cognitive function and physical ability, brain injury survivors most commonly report increased feelings of loneliness and depression. Brain injury survivors have an increased risk of suicide¹, Major Depressive Disorder² and substance abuse³. Survivors are also 400 times more likely to become homeless than a person who has not experienced a brain injury⁴. In addition, caregivers of survivors also have an increased risk of depression, especially during the transition period immediately following the survivor's discharge from the hospital⁵.

The effects of brain injuries can be felt throughout a community and Jodi House works to support all people who have been affected by brain injury. Our various activities and classes provide an opportunity for survivors to reintegrate into the community, rebuild the support network that may have been damaged during their months in rehabilitation, and continue to improve their physical and cognitive function. The respite we offer these survivors decreases the burden felt by caregivers and family members to constantly care and attend to their loved ones. Finally, through the Immersion Services Program we are not only providing survivors with increased self-confidence and motivation, but also the community with more productive and dedicated volunteers and employees.

Many insurance companies, Medicare included, will pay for inpatient rehabilitation for 60 days if the patient meets the strict need requirements⁶. Many other insurance providers will only cover 2 weeks of rehabilitation and many will not cover any rehabilitation services at all. Many survivors of severe brain injuries require longer stays yet are often forced to forgo further services because of their inability to pay. Due to their newly acquired disabilities, brain injury survivors are often unable to return to their old jobs and many rely solely on SSI or SSD for income. This reduced income further limits their ability to access further rehabilitation services. In the fall of 2013, Dr. Stephen Kaminski, MD, Director of Trauma Services at Cottage Hospital and Board Member for Jodi House began hosting a concussion clinic for high school athletes that have suffered minor traumatic brain injuries. The students we provide care for at the concussion clinic often come from families of lower socioeconomic status who are not able to access the highest quality and most appropriate healthcare for their children. These student athletes are at a higher risk of developing Second Impact Syndrome and benefit the greatest from the concussion clinic. Dr. Kaminski is providing this clinic regardless of a family's insurance or ability to pay, and will continue to do so in years to come.

While Jodi House is non-clinical in nature, we offer a program to support the continued recovery of brain injury survivors. Our Executive Director is a Psychologist, and our program contractors, staff, and volunteers include a licensed speech therapist, music and art therapists, and trained yoga and meditation instructors. This experience, along with the ongoing cognitive skill building activities that we are providing our members through programming, enables Jodi House to provide the highest level of supportive services for our members regardless of their ability to pay.

Jodi House recently implemented a voluntary sliding scale monthly fee for our members. We request any monthly contribution that they feel comfortable giving. Due to the low income nature of the majority of our clients, 89% of all members are receiving services completely free of charge. We are

proud to serve all brain injury survivors in our community, regardless of their socioeconomic background.

Goals and Outcomes

Outreach to community organizations that work directly with the homeless, veteran, and Latino populations to expand our impact.

In order to further expand our impact, Jodi House is partnering with many local organizations to educate their staff and volunteers about brain injury and increase awareness of our programs and services. According to the 2013 Vulnerability Index Survey, 20% of Santa Barbara County's homeless population reports having experienced a traumatic brain injury, and undoubtedly some have experienced acquired brain injuries as well. In addition, only 14% of our current members identify themselves as Hispanic or Latino while over 35% of Santa Barbara's total population identifies themselves as such. Finally, 10% to 20% of Iraq veterans return from service having suffered a traumatic brain injury⁷. We are working to connect to these vulnerable populations and reach those most in need of our services. We will deliver 8 presentations to community organizations in the upcoming fiscal year (July 1, 2014- June 30,2015).

Administer Quality of Life after Brain Injury Questionnaire (QOLIBRI) to each member and the Mayo-Portland Adaptability Inventory to caregivers twice per year and collect survey results for future curriculum planning.

Students from Westmont College will be surveying members and caregivers twice a year to collect data on their reported quality of life. This data will be used to identify room for improvement in Jodi House's programs and further understand the long term effects of brain injuries. QOLIBRI consists of 37 items to assess a survivor's cognitive, emotional, social and physical well-being. The Mayo-Portland Adaptability Inventory (Version 4) contains 35 questions to assess the health and wellness of each caregiver.

Have at least 6 graduates from the Immersion Services Program by the end of its first year.

Jodi House's Immersion Services Program began in the middle of July 2013 and we hope to have six members successfully complete the program by July 2014. To graduate from the program, a participant must work through ten competencies: Personal Profile, Career Goals, Resume, Job Application, Transportation, Personal Appearance, Job Search, Interviewing Skills, Employer Expectations and Customer Service. With our increased outreach in the community, and our close relationship with the Department of Rehabilitation, we plan to continue to enroll students throughout the year and have a consistent flow of graduates by the end of the program's first year.

Project Description

Our Day Program offers many different classes and activities in an effort to appeal to all of our members. Classes such as Tai Chi and yoga help promote physical balance and strength while classes such as brain work out, memory, and Spanish promote cognitive function and memory improvement. Each day consists of a different schedule and members are free to come and go as they please, choosing whichever classes and activities they wish to participate in. Our program model gives survivors the freedom and independence that they are often missing in other aspects of their lives. The support that members receive from their peers, class instructors and Jodi House staff members provides them with the self-confidence and motivation needed to continually work to improve their abilities and quality of life.

Our resource and referral program is constantly referred to as a "lifeline" by many family members and caregivers. Over the past thirty years, Jodi House has made many valuable relationships and contacts

with other organizations in the community that frequently provide services to brain injury survivors and their families. Staff members are available Monday through Friday to answer questions, provide information and make referrals.

Finally, our new Immersion Services Program requires participants to build the stamina, attendance, and knowledge necessary to gain a job or volunteer position after a brain injury. The program is highly individualized and adapted for people who are experiencing the effects of a brain injury. While many other pre-vocational training programs have been developed for the disabled, ours includes the repetition, short breaks, and the one-on-one support that brain injured participants require.

Most Pressing Needs

Our most pressing needs revolve around day to day function of Jodi House. Staff is our most precious resource, with only 3 FTEs and one part time staff member, we try to provide as much individualized attention as possible, while utilizing volunteers and interns for support. In addition, we are always in need of everyday supplies such as paper towels, toilet paper, soap, etc. These supplies are necessary for Jodi House to continue to be open to our members and their loved ones.

Evaluation of Impact

The QOLIBRI and Mayo-Portland Adaptability Inventory provide quantified data regarding the impact of our program. We are currently in the first round of surveying and the results from the first two rounds will be available in the summer of 2014. Prior to the QOLIBRI survey, Jodi House members have taken the Community Integration Questionnaire (CIQ). Of the members surveyed twice with CIQ, the average composite score of the first questionnaire was 13.5 and the average composite score of the second round was 17. This 26% increase in the survivor's quantified quality of life is suggestive of Jodi House's ability to enhance the lives of brain injury survivors.

Staff Skills and Experience

Our staff brings experience in psychology, healthcare, advocacy, and teaching. Program contractors and volunteers include a licensed speech therapist, chiropractic neurologist, music and art therapists, and trained yoga instructors. Our supportive Board of Directors includes the Director of Trauma at Cottage Hospital, an experienced Psychologist, DPH candidate, and many fundraising and finance professionals. Our relationships with high schools and universities in the area have formed a strong volunteer and internship base for the organization. We are grateful for the many bright students that volunteer from Westmont College, UC Santa Barbara, Santa Barbara City College, and local high schools. Finally, an increasing number of community leaders and health care professionals are supporting Jodi House's mission and programs. Our Professional Advisory Board includes some of Santa Barbara's top neurologists, neurosurgeons, trauma surgeons and nursing and rehabilitation professionals. The combination of these backgrounds and skills provides Jodi House with the skills necessary to successfully implement and maintain vital resources and services to those affected by brain injury.

Contingency Plan

In addition to the St. Francis Foundation, Jodi House is currently seeking funding from other private foundations including Williams-Corbett and the Wood Claeysens Foundation. In addition, our development team is working to cultivate new donor relationships and move more of our annual donors to become major donors.

References

1. Desseilles, M., Gosselin, N. Perroud, N. (2013). Assessing suicidal ideation in patients with traumatic brain injury. *Journal of Head Trauma Rehabilitation*. Mar/Apr. V28, Issue 2,149-150.
2. Bombadier, C., Fann, J., Temkin, N., Esselman, P., Barber, J., Dikmen, S. (2010). Rates of major depressive disorder and clinical outcomes following traumatic brain injury. *Journal of the American Medical Association.*, 303(19)1938-45.
3. Corrigan, J., Bogner, J. (2012). Substance misuse and traumatic brain injury. *Journal of Head Trauma Rehabilitation*. Sept./Oct. Vol 27, Issue 5, 317-318.
4. Siddique, A. (2013) Homeless People have 400 Times High Risk of Head Injuries, Say Statistics. *Medical Daily*. www.medicaldaily.com/homeless-people-have-400-times-higher-risk-head-injuries-say-statistics-245981.
5. Ben Turner, Jennifer Fleming, Julie Parry, Monique Vromans, Petrea Cornwell, Cassandra Gordon and Tamara Ownsworth (2010). Caregivers of Adults with Traumatic Brain Injury: The Emotional Impact of Transition from Hospital to Home. *Brain Impairment*, 11, pp. 281-292. doi:10.1375/brim.11.3.281.
6. Medicare Coverage of Inpatient Rehabilitation Stays. (2013). NOLO Law for All. <http://www.nolo.com/legal-encyclopedia/medicare-coverage-inpatient-rehabilitation-stays.html>
7. TBI Statistics. Brain Trauma Foundation. <https://www.braintrauma.org/tbi-faqs/tbi-statistics/>

Jodi House
Balance Sheet
 As of March 17, 2014

	Mar 17, 14
ASSETS	
Current Assets	
Checking/Savings	
1010 · Bank of Santa Barbara-3166	12,406.45
1011 · Santa Barbara Bank & Trust	1,001.73
1012 · Capital One-4046	206.32
1013 · Capital Campaign Account-5106	31,029.86
1014 · PayPal	1,265.93
1015 · Bank of Santa Barbara CD-1116	101,033.37
1016 · Bank of Santa Barbara-8145	1,410.64
1040 · Petty Cash	665.38
Total Checking/Savings	149,019.68
Accounts Receivable	
1200 · Contributions Receivable	
1210 · Pledges Receivables	
1212 · Pledges Receivable - DOR	2,925.00
1210 · Pledges Receivables - Other	40,000.00
Total 1210 · Pledges Receivables	42,925.00
Total 1200 · Contributions Receivable	42,925.00
Total Accounts Receivable	42,925.00
Other Current Assets	
1400 · Prepaid Expenses	
1430 · Prepaid Insurance WC	369.08
Total 1400 · Prepaid Expenses	369.08
Total Other Current Assets	369.08
Total Current Assets	192,313.76
Fixed Assets	
1600 · Fixed Assets	
1620 · Building - 625 Chapala St. SB	1,500,000.00
1640 · Equipment	5,968.22
Total 1600 · Fixed Assets	1,505,968.22
1700 · Accum Depreciation	
1725 · Accum Depr - Buildings	-29,167.00
1735 · Accum Depr - Leasehold Impr	-1,195.20
1745 · Accum Depr - Furn & Equip	-3,904.71
Total 1700 · Accum Depreciation	-34,266.91
Total Fixed Assets	1,471,701.31
TOTAL ASSETS	1,664,015.07
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2000 · Accounts Payable	2,472.00
Total Accounts Payable	2,472.00
Other Current Liabilities	
2100 · Accrued Liabilities	
2111 · Accrued Vacation	5,357.72
Total 2100 · Accrued Liabilities	5,357.72
2500 · LOC-Bank of Santa Barbara-0186	35,000.00
Total Other Current Liabilities	40,357.72
Total Current Liabilities	42,829.72

12:33 PM
03/26/14
Accrual Basis

Jodi House
Balance Sheet
As of March 17, 2014

	<u>Mar 17, 14</u>
Total Liabilities	42,829.72
Equity	
32000 · *Unrestricted Net Assets	1,506,293.58
3900 · Retained Earnings	133,616.04
Net Income	-18,724.27
Total Equity	<u>1,621,185.35</u>
TOTAL LIABILITIES & EQUITY	<u><u>1,664,015.07</u></u>

OGDEN UT 84201-0038

In reply refer to: 0441679376
Aug. 02, 2010 LTR 4168C E0
95-3836137 000000 00
00031067
BODC: NOBOD

JODI HOUSE INC
% KENNETH FREELAND
625 CHAPALA ST
SANTA BARBARA CA 93101

032223

Employer Identification Number: 95-3836137
Person to Contact: C Winn
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your July 22, 2010, request for information regarding your tax-exempt status.

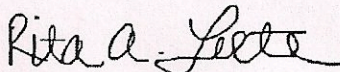
Our records indicate that your organization was recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in March 1983.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

If you have any questions, please call us at the telephone number shown in the heading of this letter.

Sincerely yours,



Rita A. Leete
Accounts Management II