

Cover Sheet- (One Page Maximum)

Funder you are applying to: St. Francis Foundation

Legal Name of Applicant Organization: Teddy Bear Cancer Foundation

Contact Person & Title: Lindsey Guerrero, Executive Director

Contact Person's Email:

Phone: 805-962-7466 Fax: 805-884-1019 lindsey@teddybearcancerfoundation.org

Program Name/Capital Request: Financial Assistance Program

Funds will pay for: Financial assistance for families who have a child with cancer

Full Mailing Address: 2320 Bath Street, Suite 107, Santa Barbara, CA 93105

Location(s) if different from above: _____

Executive Director: Lindsey Guerrero

Email: lindsey@teddybearcancerfoundation.org

Fax: 805-884-1019

Phone: 805-563-4740

Website: www.teddybearcancerfoundation.org

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

501(c)(3) Granted Other: Tax ID Number: 14-1872081

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: \$636,454

Funds will be used from: 06/01/2014 To: 05/31/2015

Total Organizational Budget Current Year: \$907,800 Agency fiscal year begins: January 1

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

The mission of Teddy Bear Cancer Foundation is to provide financial and emotional support to families of children with cancer living in Santa Barbara, Ventura, and San Luis Obispo counties. To learn more about the profound impact we have on families, please watch our new video called *One Voice* by visiting our home page at www.teddybearcancerfoundation.org.

Summarize your grant request (two to three sentences):

We are requesting a \$20,000 grant to provide financial assistance to families who have a child with cancer in southern Santa Barbara County. We provide financial assistance for rent, mortgage, utilities, car payments, counseling, groceries, nutritional supplements, childcare, hotel accommodations, funeral expenses, meals for families while at the hospital, and other necessities.

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:

Tina Frontado, Board Chair



03/12/2014

Name of Authorized Board/Governing Body Representative Title

Signature Date

Lindsey Guerrero, Executive Director



03/12/2014

Name of Lead Staff Member (or 2nd Representative) Title

Signature Date

1. Your organization's history and accomplishments.

Teddy Bear Cancer Foundation was founded in 2002, and served 40 Santa Barbara families in its first year. In 2009 we expanded to Ventura, which increased our client base by 20 percent. We assisted more families than ever in 2013, with 155 families (664 individuals) benefiting from one of our many programs. Of those families, 45 percent were from Ventura, 49 percent were from Santa Barbara, and 6 percent were from San Luis Obispo.

2. Your current programs and activities. Include the constituency you serve ...

Our services benefit families of children diagnosed with cancer before age 18 until the age of 21:

- **Financial assistance:** We provide financial assistance for critical living expenses, educational testing and tutoring, hotel accommodations, and funeral costs. More details about this program can be found below in the "Project Description" section.
- **Family Support Groups:** We offer support groups for parents facilitated by a licensed social worker in Santa Barbara and Ventura. We also offer expressive art and discussion groups for children with cancer and their siblings.
- **Bereavement Support Group:** With the assistance of a licensed therapist, this group helps parents process their grief in order to take steps toward healing.
- **Care for the Caretakers:** Being a caretaker of a child with cancer can be exhausting and isolating. Events like our Mother's Spa Day focus on pampering the caretakers.
- **Moments in Time:** Thanks to generous donors, we are able to offer special experiences to children, including surprise birthday parties in the hospital or meeting celebrities.
- **"Bear" Necessities:** We offer families donated items such as furniture, appliances, clothing, or bedding, as well as diapers and wipes for families with little ones.
- **TBCF Storytellers:** Three times a week, a volunteer reads stories to all the children in pediatrics at Cottage Hospital in Santa Barbara. We also offer free books and toys for the children to keep.
- **Family Fun Events:** We host fun events and trips for children and their families throughout the year, such as our Family Fun Days or a trip to Universal Studios.
- **Holiday Support:** We help families enjoy the holidays during difficult times by offering presents, gift baskets, or parties for Christmas, Thanksgiving, Easter, and Valentine's Day.
- **Bone Marrow Drives:** In collaboration with Be the Match Registry, we help coordinate bone marrow drives to benefit families in search of a match for their child.

3. Your organization's relationships with other orgs. working to meet the same need.

Cottage Hospital offers up to \$2,000 to families of children receiving medical care at Cottage. We coordinate closely with them in order not to duplicate assistance. We remain the only local agency that exclusively serves families who have a child with cancer. Our closest relationships are with the Santa Barbara Pediatric Oncology/Hematology Clinic and the Ventura County Medical Center's Pediatric Oncology Clinic. Together, the Leukemia & Lymphoma Society, Cancer Support Community, Community Memorial Hospital, Landon Pediatric Foundation, St. John's Cancer Center of Ventura County, and the Santa Barbara Cancer Center sponsor our family support groups. We collaborate with Angel Flight West which provides air transportation for medical treatment, Be the Match which finds bone marrow donors, Eric's Angels which offers Christmas presents to families, LifeChronicles which videotapes the life stories of children lost to cancer for their parents, and the National Charity Leagues of Santa Barbara and Ventura which provide us with volunteers.

Funding Request:

1. What need or problem does your project work to address?

Statistics from the California Cancer Registry for 2008-2009 (the most recent statistics available) show a total of 170 new cases of childhood cancer in the tri-county area. In 2013, we served 664 people (155 families). Having a child with cancer is one of the most stressful experiences a family can endure, and they frequently feel frightened, alone, helpless, and hopeless. Some of the needs that families have as they move through the crisis of childhood cancer are described below.

Financial Needs of Families

"Teddy Bear has been such a blessing to our family. Just to get a bill, not open it and send it off is one of the biggest stress relievers to us. My husband has not been able to work much and he feels happy that he can be with us in the hospital not worrying about getting money to send off for bills. Thanks for all your hard work!" –Mendoza family

Families can face severe financial challenges as a result of a cancer diagnosis. According to the National Children's Cancer Society, the average out-of-pocket cost to battle childhood cancer is over \$9,700. Food, transportation, and accommodations during treatment often add to the financial burden for families. Parental income can be significantly affected as well. Working parents can lose wages—or their jobs—due to the time required to see their child through the treatment process, which can take up to three years. Approximately 89 percent of families report income loss due to their child's treatment (*source: National Children's Cancer Society*). Without our financial assistance, many families would lose their homes or cars.

Emotional Needs of the Child with Cancer

"The many activities and parties offered by TBCF made our daughter's experience so much more tolerable during the two and a half years she was in treatment."
—Mireles Family

During treatment children often experience pain, fear, sadness, loneliness, isolation, and the inability to engage in normal childhood activities. Emotional support in the form of support groups, the presence of parents, and opportunities to have normal childhood experiences are important in children's ability to cope. We provide much of this critical support through the variety of programs we offer.

Emotional Needs of Parents

"I would like to thank you for the [support group]. It allowed my wife to speak with Spanish-speaking families. She was able to see that other families were going through the same struggles with their child. We hope that Teddy Bear Cancer Foundation continues helping families." –Gutierrez family

The level of support required to see a child through treatment can take a significant emotional toll on parents. In addition to basic child care, the role of parents includes supporting their child emotionally, speaking and acting on behalf of their child, being responsible for some parts of the treatment and care giving, and being there for their child when nothing else seems to help. This exhausting caretaking role—along with the intense fear that their child might die—puts a huge amount of stress on parents. It is with this understanding that Teddy Bear devotes a significant portion of our programs to parental emotional support.

Emotional Needs of Siblings

"The staff really cares about the children and the families they help. That's what puts your program over the top!" —Teddy Bear Cancer Foundation parent

Siblings of children with cancer often undergo stressful changes as they live a new life with periods of ups and downs according to the condition of their sibling. Feelings of jealousy, fear, worry, and sadness are common, and siblings are at risk for developing behavioral and emotional problems if they do not have proper support. This is why many of our programs are designed to meet the needs of siblings too.

Needs After Treatment

“Melinda was in desperate need of a therapist who could help her after treatment ended and late effects surfaced. Teddy Bear paid for this and helped save her life!”

—Lee Marchiano, Melinda’s mother

Sixty percent of children who survive cancer face what are termed “late effects” which are most often caused by chemotherapy. Late effects can occur years after treatment, and include development of secondary cancers, hormonal changes such as infertility or early puberty, impaired cognitive and social abilities, organ damage, sight or hearing problems, bone problems such as scoliosis, or delays in development. Parents commonly have fears of relapse and justifiable concerns about their children’s future health. We support families from initial diagnosis through any late effects and post-treatment stress they might experience. Because the process can last for so long, many families continue to be affected both emotionally and financially for months or years after treatment is completed. This means that in any given year we are serving more families than those whose child is diagnosed in that year.

2. In a short paragraph, tell us your project’s (or organization’s) goals and outcomes...

The goal of our financial assistance program is to allow parents to be with their children through every step of the treatment process without having to worry about financial devastation. Our objectives are to meet the financial needs of all families who request help. In 2013, we served 393 people (90 families) through all of our financial assistance opportunities, a 14 percent increase over the number of families served with this program in 2012. Of those, approximately 15 percent live in southern Santa Barbara County. Our goal is to increase the number served with financial assistance by at least 10 percent for 2014. Any funding received from the St. Francis Foundation would be used solely for families in southern Santa Barbara County.

3. Describe your project or the capital items requested...

We offer a significant amount of financial assistance to low- and moderate-income families, and qualified families can receive assistance valued at as much as \$12,000 by accessing all of the following:

- **Financial Assistance:** Families can receive up to \$5,000 for rent or mortgage; auto loan, registration, insurance, and repairs; utility bills; medications and home care services not covered by insurance; and counseling, child care, or other needs.
- **Critical Needs:** We provide free grocery vouchers, gas cards, and hospital cafeteria gift certificates.
- **Education Support:** To help children address learning problems that are a common side effect of chemotherapy, we cover up to \$1,000 for the cost of neuropsychological testing and up to \$500 for tutoring by credentialed teachers.
- **Hotel Accommodations:** We offer free hotel accommodations to immediate family during an emergency or an unusually extended hospital stay.
- **Funeral Fund:** We assist families with up to \$4,000 for funeral arrangements.

We follow the guidelines developed by the U.S. Department of Housing and Urban Development (HUD) in assessing income status. We have a financial aid application that asks families to disclose their household income and expenses, debt payments, and if they are already receiving aid from any another source. Applications are administered by the social workers at the clinics where the children are treated, and then passed on to our organization for funding.

4. If this is a request for General Support, what are your organization’s most pressing needs.

N/A

5. **How do you plan to evaluate the effectiveness or impact of the project?**

We will evaluate the effectiveness of our work by tracking the number of families we have been able to help compared with the need. If we are able to serve all families who need it, we will be successful. We also solicit feedback from families regularly, and use their comments to inform decision-making about our programs. Past feedback from families has included:

“Teddy Bear Cancer Foundation provided our family with financial and emotional support when our son was diagnosed with cancer. With the loss of one income and huge medical bills, Teddy Bear was our lifeline. Their financial support allowed us to keep our head above water. We are grateful for everything Teddy Bear has done for us.”

“Thank you so much for providing hotel accommodations as we are from out of the area and had to stay a number of days when our son was first diagnosed. It would have been a real hardship had we had to pay to stay somewhere.”

“When our two and a half year old daughter was diagnosed with leukemia, our lives were thrown into turmoil. Not only were we worried about the life of our young daughter, we encountered many financial challenges with the enormous medical costs for the care of our daughter. Luckily, the Teddy Bear Cancer Foundation was there to help us from the very beginning.”

6. **Summarize the skills and relevant experience of key staff/volunteers...**

Lindsey Guerrero, Executive Director: Lindsey comes to us with experience in program administration, fundraising, grant writing, donor cultivation, and facility management. Before joining our team, she worked at Santa Barbara Channelkeeper as development director, at Boys & Girls Club of Santa Clara Valley as vice president of operations, and at United Boys & Girls Clubs of Santa Barbara County as a branch director. Lindsey holds a Multiple-Subject Teaching Credential and M.A. in education from National University and a B.A. in sociology from UCSB.

Rosio Almaguer, Program Director: Rosio joined our staff in September 2013, bringing her experience with PUEBLO, Santa Barbara County Action Network, UCSB IDEAS, Latinas Learning to Lead, Legal Education Association for Diversity, and the Santa Barbara School District to her work with us. Rosio holds a B.A. in Chicano/a studies and education from UCSB.

Bryan Kerner, Director of Development: Bryan joined Teddy Bear in 2013, bringing with him years of non-profit experience. He spent ten years as the finance chair of the American Cancer Society’s Relay for Life event in Connecticut, served as president of the Collinsville Arts Initiative, and created the Collinsville Chalk Walk fundraiser. He brings his recent experience as a brokerage director at a local insurance company to his role at Teddy Bear. Bryan holds a B.S. in business administration with a concentration in finance and operations management from Eastern Connecticut State University.

Becca Solodon, Director of Family Support & Volunteer Services: As a teenager, Becca came to us as a client, and in 2004 began working for us in a part-time capacity. She now is our full-time Program Assistant. Her personal experience with childhood cancer makes her an incredibly dedicated and compassionate employee. In addition to her role at Teddy Bear, Becca works with the American Cancer Society, Hugs for Cubs, and the Make-A-Wish Foundation.

Organizational Collaborations: We collaborate with other organizations as explained in the “Background Section.”

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

We are continually seeking out funding for our organization and its programs. If full funding is not available, we will continue to request funding from other sources. If we cannot fully meet our budget, we may have to decrease the number of families we serve with financial assistance.

Applicant name: Teddy Bear Cancer Foundation

Board of Directors/Governing Body

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

Name	City	Affiliation/Profession	Board Position	Member since
Tina Frontado	Santa Barbara	Owner – SB Philanthropy	Chair	2010
Nicole Greene	Santa Barbara	Community Philanthropist	Vice-Chair	2011
Linda Vannier	Santa Barbara	Certified Public Accountant	Treasurer	2013
Nicole Romasanta	Santa Barbara	Community Philanthropist	Secretary	2012
Rosalind Gies Amorteguy	Santa Barbara	Community Philanthropist	Member	2006
James Bechtel	Santa Barbara	Senior Investment Manager – Wells Fargo	Member	2009
Hank Blanco	Santa Ynez	Retired Real Estate Investor	Member	2011
Katherine Eades	Santa Barbara	Community Philanthropist	Member	2012
Donna Barranco Fisher	Santa Barbara	Education/Parent Advocate	Member	2011
Melissa Franzen	Santa Barbara	Retail	Member	2014
Kristin Lima	Santa Maria	Education Administrator	Member	2013
Bibi Moezzi	Santa Barbara	Vice President, Senior Client Relationship Manager	Member	2013
Michelle Lee Pickett	Santa Barbara	Corporate and Tax Attorney - Brownstein Hyatt Farber & Schreck	Member	2006
Susannah Rake	Montecito	President - Coolwater Design Group, Community Philanthropist	Member	2007
Lisa Solana	Santa Barbara	Vice President, Entertainment Marketing Strategy and Development- ABC	Member	2012

How often does the Board / Governing Body meet? Monthly

Applicant Name: Teddy Bear Cancer Foundation

Program or Capital Budget

Program Name/Capital Request: Financial Assistance for Families of Children with Cancer

Budget dates for grant period: June 1, 2014 - May 31, 2015

INCOME

Possible categories: Gov't. grants, foundation grants, individuals, business support, events, fees for svcs. etc.

Source	Total Program	Pending	Secured	Notes
Individual Contributions	\$105,454	\$105,454		
Corporate Contributions	\$42,000	\$42,000		
Grants	\$115,000	\$115,000		
Special Events	\$304,000	\$304,000		
In-Kind Donations	\$70,000	\$70,000		
TOTAL INCOME	\$ 636,454.00	\$ 636,454.00	\$ -	

List the In-Kind (non-cash) contributions: Hotel accomodations, fuel cards, grocery cards

EXPENSES

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

Item	Total Program	This Request	Notes
Direct Family Assistance	\$165,000	\$ 20,000.00	
Critical Needs	\$9,000		
Hotel Accomodations	\$9,000		
Education Program	\$15,000		
Funeral Fund	\$25,000		
In-Kind	\$49,000		
Compensation and benefits	\$197,262		
Rent	\$15,000		
Office Supplies	\$2,826		
Telephone	\$3,390		
Outside Services	\$5,946		
Grant Writing	\$7,074		
Accounting/Audit/Payroll	\$5,087		
Computer/IT	\$2,544		
Printing and Reproduction	\$4,635		
Postage and Delivery	\$3,504		
Meetings	\$565		
Auto and Travel	\$1,130		
Advertising	\$8,252		
Staff Appreciation	\$283		
Professional Development	\$1,130		
Fund Development/Events	\$97,350		
Bank Charges	\$2,260		
Insurance	\$3,390		
Misc. Operating	\$2,826		
TOTAL EXPENSES	\$636,454	\$ 20,000.00	

Organization Financial Summary

Organization Name: Teddy Bear Cancer Foundation

Organization Financial Summary January 1 - December 31

INCOME (Government grants, foundation grants, individuals, business support, events, fees for service, etc.)

Source	Prior Year's Actual Dec. 31, 2013	Projected Annual Budget 2014	YTD Actual (\$) Jan. 31, 2014
Board / Individuals	\$ 132,879.00	\$ 155,800.00	\$ 838.00
Special Events	\$ 362,992.00	\$ 368,000.00	\$ -
Grants/Foundation	\$ 139,310.00	\$ 169,000.00	\$ 72,500.00
Corporate Grants	\$ 37,000.00	\$ 48,000.00	\$ 10,000.00
Corporations	\$ 55,929.00	\$ 60,000.00	\$ -
Government	\$ 3,500.00	\$ 7,000.00	\$ 3,500.00
In Kind Donations	\$ 76,656.00	\$ 100,000.00	\$ -
Interest	\$ 2,449.00		\$ 30.00
TOTAL INCOME	\$ 810,715.00	\$ 907,800.00	\$ 86,868.00

List the In-Kind (non-cash) contributions: items for families

EXPENSES (Salaries, professional fees, rent and utilities, travel, publicity/outreach, events, etc.)

Item	Prior Year's Actual Dec. 31, 2013	Annual Budget 2014	YTD Actual (\$) Jan. 31, 2014
Financial Assist. to Families	\$ 202,344.00	\$ 219,000.00	\$ 18,671.00
Family Events and Services	\$ 11,515.00	\$ 14,600.00	\$ 95.00
Family Programs (in kind)	\$ 76,656.00	\$ 100,000.00	\$ -
Salaries and Benefits	\$ 276,707.00	\$ 340,500.00	\$ 35,981.00
Fundraising	\$ 86,607.00	\$ 101,500.00	\$ 357.00
Donor Solicitation and Cultivation		\$ 3,000.00	\$ -
Rent	\$ 24,690.00	\$ 28,000.00	\$ 2,200.00
Office Supplies	\$ 5,234.00	\$ 2,500.00	\$ 695.00
Utilities and Phone	\$ 9,852.00	\$ 6,000.00	\$ 1,533.00
Outside Svcs. (grants, consultants, cleaning)	\$ 35,993.00	\$ 38,700.00	\$ 3,076.00
Computer/IT	\$ 14,159.00	\$ 8,200.00	\$ 1,991.00
Printing and Copies	\$ 12,049.00	\$ 12,500.00	\$ 350.00
Postage and Delivery	\$ 4,083.00	\$ 4,000.00	\$ -
Meetings	\$ 2,137.00	\$ 1,000.00	\$ 31.00
Travel	\$ 2,088.00	\$ 3,000.00	\$ 93.00
Advertising/Website	\$ 11,843.00	\$ 13,200.00	\$ 50.00
Staff Appreciation	\$ 874.00	\$ 800.00	\$ 425.00
Professional Development	\$ 1,078.00	\$ 2,500.00	\$ 90.00
Bank Charges	\$ 2,874.00	\$ 2,800.00	\$ 780.00
Insurance	\$ 6,106.00	\$ 6,000.00	\$ -
TOTAL EXPENSES	\$ 786,889.00	\$ 907,800.00	\$ 66,418.00
NET PROFIT OR LOSS	\$ 23,826.00	\$ -	\$ 20,450.00
Total Capital Expenses			

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

Explanatory Notes:

Applicant Name: Teddy Bear Cancer Foundation**Organization Balance Sheet Summary****Note:** Check with each foundation to see if this form is required.

	MOST CURRENT (\$)	PRIOR YEAR CLOSE (\$)
ASSETS	Jan. 31, 2014	Dec. 31, 2013
Current Assets		
Cash and Equivalents	\$ 376,759.00	\$ 366,482.00
Accounts Receivable	\$ 69,921.00	\$ 62,782.00
Prepaid Expenses	\$ 9,858.00	\$ 9,121.00
Inventory		
Grants/Pledges Receivable		
Other: Awarded Financial Assistance	\$ 36,732.00	\$ 36,730.00
Fixed assets (Net)		
Property		
Buildings		
Equipment	\$ 6,618.00	\$ 6,618.00
Investments		
Endowments	\$ 52,110.00	
Other:	.	
TOTAL ASSETS	\$ 551,998.00	\$ 481,733.00
LIABILITIES		
Current Liabilities		
Accounts Payable	\$ 1,420.00	\$ 1,620.00
Accrued Expenses	\$ 4,358.00	\$ 4,358.00
Long Term Debt (Current Portion)		
Short Term Debt		
Other: Pledged Financial Assistance	\$ 51,521.00	\$ 51,521.00
Other: Deferred Revenue	\$ 55,000.00	\$ 7,500.00
Other: PR Clearing Account	\$ 300.00	
Long Term Debt (over a year)		
Loan		
Other:		
TOTAL LIABILITIES	\$ 112,599.00	\$ 64,999.00
NET ASSETS	\$ 439,399.00	
Unrestricted		\$ 365,213.00
Temporarily Restricted		\$ 51,521.00
Permanently Restricted		
TOTAL LIABILITIES		
AND NET ASSETS	\$ 551,998.00	\$ 481,733.00

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

DEPARTMENT OF THE TREASURY

Date:

APR 21 2008

TEDDY BEAR CANCER FOUNDATION
133 E DE LA GUERRA ST STE 163
SANTA BARBARA, CA 93101-2228

Employer Identification Number:

14-1872081

DLN:

17053096735078

Contact Person:

CARLY D YOUNG

ID# 31494

Contact Telephone Number:

(877) 829-5500

Public Charity Status:

509(a)(2)

Dear Applicant:

Our letter dated October 2003, stated you would be exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, and you would be treated as a public charity, rather than as a private foundation, during an advance ruling period.

Based on the information you submitted, you are classified as a public charity under the Code section listed in the heading of this letter. Since your exempt status was not under consideration, you continue to be classified as an organization exempt from Federal income tax under section 501(c)(3) of the Code.

Publication 557, Tax-Exempt Status for Your Organization, provides detailed information about your rights and responsibilities as an exempt organization. You may request a copy by calling the toll-free number for forms, (800) 829-3676. Information is also available on our Internet Web Site at www.irs.gov.

If you have general questions about exempt organizations, please call our toll-free number shown in the heading.

Please keep this letter in your permanent records.

Sincerely yours,



Robert Choi
Director, Exempt Organizations
Rulings and Agreements