

**Friendship Center Report on Funding for
Registered Nurse/HEART (Help Elders At Risk Today)
FY 2014-15**

Dear Trustees,

Friendship Center was awarded \$12,000 June 9, 2014 and is thankful for the continued generosity of the Saint Francis Foundation. Though the fiscal year will not be completed until June, the following is a report of how these funds have supported our program this year for our dependent adult members and their caregivers:

- ✓ A registered nurse on call enriches our day services and provides much-needed support for aging and dependent adults with chronic illnesses, specifically monitoring medications and nutrition, interfacing with physicians, creating care plans, and making health assessments of members.
- ✓ Our nurse has provided educational sessions for staff, including training in Universal Precautions and dealing with members' difficult behaviors.
- ✓ Our nurse oversees staff in administering medications, including PRNs, often a necessity for 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 call increases their peace of mind and the likelihood of enrollment to our program; in turn deterring costly long-term care.
- ✓ The St. Francis Foundation's funding covered approximately 100 hours of professional nursing services by a registered nurse in FY14-15 to date.
- ✓ Through our HEART Program, we were able to provide over 180 days of services to our low-income members.
- ✓ The proliferation of low-income families utilizing our services in recent years has dramatically increased the importance of HEART as we strive to serve as many in need as possible.

The Foundation Roundtable: Common Grant Application

Cover Sheet

Foundation you are applying to: _____
Legal Name of Applicant Organization: _____
Project Name (if applicable): _____
Funds will pay for: _____
Full Mailing Address: _____
Location(s) if different from above: _____
Executive Director: _____
Phone: _____ Fax: _____
Email: _____ Website: _____
Contact Person & Title: _____ Phone: _____

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: _____ 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: \$ _____ Total Project Budget: \$ _____

Grant Period from: _____ To: _____

Total Organizational Budget for Current Year: \$ _____ Fiscal year begins: _____

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

Summarize your grant request (two to three sentences):

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:

Signature Name & Title of Authorized Board/Governing Body Representative Date

Signature Name & Title of Authorized Board/Governing Body Representative Date

FRIENDSHIP ADULT DAY CARE CENTER PROPOSAL

Background (One page or less)

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, with locations in Goleta and Montecito. Our 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 FY2013-14, Friendship Center provided service to 320 dependent elders and their 800 caregivers. Over 24,430 meals and snacks were served with 173,425 hours of respite provided to family members and caregivers, not to mention peace of mind, knowing their loved ones are well cared-for at the Center while they fulfill other duties during the day. As of June, the end of our fiscal year, we were serving an average of 33 members per day at our Montecito center, with average daily attendance of 19 in Goleta.

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. The main goals of the program include maintaining quality of life, dignity, and as much independence as possible for our participants, as well as providing socialization and mental and emotional stimulation to allay depression and anxiety. Activities include live music and dance performances, visits from local schools, chat groups, cooking classes, yoga and other movement sessions, and current events discussions. Respite for our participants' caregivers is the other vital component of our program. Regular support group meetings are also provided for them, as well as individual counseling.

Friendship Center's members live in southern Santa Barbara County from Carpinteria to Goleta. The majority of those we serve have Alzheimer's disease, while others have related cognitive disorders, with an increasing number of developmentally disabled adults as this population ages.

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 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. Our newest collaborative relationship with DASH (Doctors Assisting Seniors at Home) is an exciting prospect for the improved health and well-being of our members. 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, 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

What need or problem does your project work to address?

As the population ages, and medical intervention and healthful living practices allow people to live longer, Alzheimer's cases in the U.S. will triple over the next 35 years--from an estimated 5 million Americans today to 15 million, according to a recent government study. Today, this disease strikes every 67 seconds, bringing with it a terrible financial, emotional, and physical burden for those afflicted and their family caregivers. Alzheimer's is poised to become one of the biggest public health concerns to ever face the U.S.

\$5,000 of our request is to partially fund the implementation of our new medical program incorporating DASH's services, including staff time/training, marketing/advertising, and educational programs for family caregivers, as well as partially supporting salary for our on-call nurse. With the population living longer, our members are more advanced in age and compromised health now than ever. The majority 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.

\$10,000 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.

Dependent adults with cognitive disorders and their caregivers greatly benefit from the dynamic social, learning, and therapeutic activities offered at the Center. These benefits include 1) abatement of depression and anxiety, 2) deterrence of long term care and mitigation of the accompanying financial and emotional costs and 3) respite for caregivers from the stresses of constant care for their loved ones.

The respite that day services provide, along with the Center's caregiver support and education program, improves these caregivers' abilities to care for their loved ones, often preventing or delaying in-home nursing or placement in long-term care facilities, and allowing families to stay together longer. Day services allow caregivers the time and peace of mind to relax and attend to other responsibilities, which enables them to return, refreshed, to their caregiving duties with increased patience and compassion, vital in deterring elder abuse and neglect.

In a short paragraph, tell us your project's (or organization's) goals and the specific outcomes you project for the grant period (i.e. numbers served, behavior or attitudes changed, capital project completed, etc.).

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. 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. In FY2015-16, with full funding, we will be able to serve 370 aging and dependent adults and their approximately 925 caregivers.

Describe your project or the capital items requested, including:

•Whether the project is new, ongoing or an expansion

This request is ongoing, yet with some adjustments this year. The St. Francis Foundation 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. We ask again for funding to address the medical needs of our members, but for the majority of that care, we will utilize the services of DASH (Doctors Assisting Elders at Home). While we retain an RN on call to ensure that medications are administered properly and first-aid kits are updated and replenished as needed, we feel that DASH is the best all-around solution for our members' medical needs while they are at Friendship Center.

For the first time in 2012, 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 for funding again this year for this purpose.

•Target audience, including specific demographic information

As mentioned above, the majority of Friendship Center's members have Alzheimer's disease. Others have related cognitive disorders or conditions related to aging, and we serve an increasing number of developmentally disabled adults as this population ages. Ages range from 55 to 101; 56% are female, 44% male. 81% are Caucasian, 14% are Latino; 3% are Asian/Pacific Islander; 2% are African-American; 80% 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% of these family caregivers 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.

•Activities/strategies that will be used to meet your stated outcomes

Friendship Center's Board of Directors and staff are highly motivated to maintain our program's sustainability and to keep our services affordable to all, as we provide an important safety net for the most vulnerable members of our population—aging and dependent adults—as well as important "step down" medical care after a hospital stay. 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 have assembled an auxiliary speakers' bureau of former caregivers to make presentations to groups, to share 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 will be familiar with our services *before* they need them, and be able to access them when needed in order to improve quality of life for them and their loved ones.

•General timeline for the main objectives of your project

Our program and services are ongoing.

If this is a request for General Support, what are your organization's most pressing needs?

N/A

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

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.

Summarize the skills and relevant experience of key staff/volunteers essential to the project's success. If other organizations are collaborating on this project, 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: **Kristen Hoye, MSW** has a Bachelor's degree in Political Science from Connecticut College, a Masters of Social Work degree from Hunter College School of Social Work in NYC, and a professional certificate in Alcohol & Drug Counseling from Santa Barbara City College. Ms. Hoye has over 15 years of experience as a social worker, community organizer and integrative therapist.

Program Manager: **Debbie Renaud** received her BA in Women's & Religious Studies at Cal State University Northridge and is currently pursuing her Masters in Aging Services Management at the USC Davis School of Gerontology. She worked for 8 years as director of a memory care assisted living home in Santa Barbara and program director at Vista del Monte, and joined the Friendship Center staff in June, 2014.

Family Services (Goleta)/Administrator: **Tracy Cohn** has a BA in Business, with a minor in Psychology, from Sonoma State University and a BA in Education from California State University Northridge & University of California at Santa Barbara. She has been a Special Education teacher in Santa Barbara and Los Angeles, and spent 23 years working with persons with traumatic brain injuries. Ms. Cohn joined the Friendship Center staff in January, 2014.

Registered 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.

As mentioned previously, we have recently undertaken a collaboration with DASH (Doctors Assisting Elders at Home) in order to most efficiently care for the health of our members.

If full funding is not available, what is the contingency plan for securing additional support and/or how can you modify your proposal?

If full funding is not available, Friendship Center may be forced to reduce the scope of its medical services, resulting in a diminished ability to serve its participants with increasing health issues. 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 in this case.

The Foundation Roundtable: Common Grant Application

Project Budget

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

Organization Name: _____

Name of Project (if different): _____

Budget dates for grant period: _____

NOTE - Do not use commas as thousand separators in any of the numerical fields

INCOME

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

Source	Total Project (\$)	Pending (\$)	Secured (\$)	Notes
TOTAL INCOME				

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

EXPENSES

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

Item	Total Project (\$)	This Request (\$)	Notes
TOTAL EXPENSES			

The Foundation Roundtable: Common Grant Application

Organization Financial Summary

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

Organization Name: _____ Fiscal Year Dates: _____

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 ["*****"]
TOTAL INCOME			

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 ["*****"]
TOTAL EXPENSE			
NET PROFIT OR LOSS			

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

Notes:

The Foundation Roundtable: Common Grant Application

Organization Balance Sheet Summary

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

ASSETS	MOST CURRENT (\$) as of ["*****"]	PRIOR YEAR CLOSE (\$)
Current Assets		
Cash and Equivalents		
Accounts Receivable		
Prepaid Expenses		
Inventory		
Grants/Pledges Receivable		
Other		
Fixed Assets (Net)		
Property		
Buildings		
Equipment		
Investments		
Endowments		
Other		
TOTAL ASSETS		
LIABILITIES		
Current Liabilities		
Accounts Payable		
Accrued Expenses		
Long Term Debt (Current Portion)		
Short Term Debt		
Other		
Long Term Debt (over a year)		
Loan		
Other		
TOTAL LIABILITIES		
Net Assets		
Unrestricted		
Temporarily Restricted		
Permanently Restricted		
TOTAL LIABILITIES AND NET ASSETS		

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).

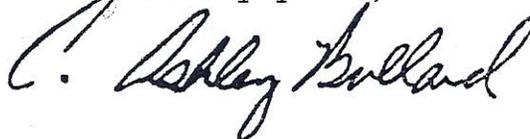
Grantors and contributors may rely on this determination unless the Internal Revenue Service publishes notice to the contrary. However, if you lose your section 509(a)(1) status, a grantor or contributor may not rely on this determination if he or she was in part responsible for, or was aware of, the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