

## Cover Sheet

Funder you are applying to: St. Francis Foundation  
 Legal Name of Applicant Organization: Center for Successful Aging

Contact Person & Title: Gary Linker, Executive director  
 Phone: 805-963-8080 Fax: 888-347-0150 Contact Person's Email: garylinker@cox.net

Program Name/Capital Request: Senior counseling, educational services

Funds will pay for: Volunteer training, educational programming, telephone reassurance program  
 Full Mailing Address: 1528 Chapala Street, #205, Santa Barbara, CA 93101

Location(s) if different from above: \_\_\_\_\_  
 Executive Director: Gary Linker, Executive Director Email: garylinker@cox.net  
 Fax: 888-347-0150 Phone: 805-963-8080  
 Website: www.csasb.org

Tax-exempt Status: {Most funders require 501(c)(3) status. Check this requirement before applying}  
 501(c)(3) Granted  Other: \_\_\_\_\_ Tax ID Number: 80-0422344

**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: \$10,000 Of Total Budget: 82,500  
 Funds will be used from: July 1, 2012 To: July 31, 2013  
 Total Organizational Budget -Current Year: \$82,500 Agency fiscal year begins: Jan 1

Summarize the organization's mission statement (two to three sentences):  
 The Center for Successful Aging (CSA) provides critical support to elderly adults and their families through senior peer counseling, senior support groups and educational initiatives. We promote the physical, spiritual, mental and emotional health of seniors, serving those facing serious illness, loss of a loved one, isolation from family and friends, transitions to assisted living and other trials that come with aging. Through CSA, seniors have access to the essential programs and services to achieve the optimum quality of life and to remain independent for as long as possible, all at no cost to them.

Summarize your grant request (two to three sentences):  
 This is a request for \$10,000 for general operating support to maintain our core services: counseling, support groups, educational presentations and our CareLine phone program. This request is critical and urgent: government funds for mental health services have been slashed, leaving low and middle income seniors in our community without needed support. All of our services are free of charge to the client, making us an important safety-net organization for elderly Santa Barbara County residents.

**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:

Bobbi Kroot,	Board President	3/23/12
Name of Authorized Board/Governing Body Representative	Title	Signature    Date
Gary Linker,	Executive Director	3/23/12
Name of Lead Staff Member (or 2nd Representative)	Title	Signature    Date

## Proposal Narrative

### Background (One page or less)

**1. Your organization's history and accomplishments.** When the Center for Successful Aging was fortunate enough to receive funding from the St. Francis Foundation in July of 2009, we were providing services as a unique collaboration between Catholic Charities and the Jewish Federation. Due to continued growth and success, CSA became its own 501c3 non-profit organization shortly thereafter. Since then, our board has grown to its current level of 14 members and remains committed to CSA's future by organizing two fundraising events yearly, donor solicitation and program development and direction. In this past year, CSA's dedicated senior peer counselors have contributed over 3,000 volunteer hours of compassionate care to seniors facing illness, loss, isolation, and life transitions. Our support groups have provided over 1,500 service hours to seniors and their families in need of a safe and supportive place to discuss the challenges of aging. *CSA continues to provide these services, with no fees of any kind, making it the only such organization in Santa Barbara.*

In January of this year CSA was the sponsoring agency bringing together over 30 agencies providing services in Santa Barbara for a day long symposium where new methods for referral and interface took place. From this effort we hope to convene an ongoing group that will advocate for seniors and prepare our community for the senior tsunami of services that will be needed as 18 million people turn 65 for the next 18 years. On a local level CSA now serves over 150 unduplicated individual clients. We currently have 42 trained volunteer senior peer counselors, a 34% increase over last year, and twelve senior peer support groups throughout the community, compared with seven a year ago.

**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?** We serve seniors in Santa Barbara in need of support facing the issues and challenges of aging. Cutbacks in public funds for mental health services have created an increase in demand from low-income to moderate income seniors. Our counselors meet with clients at their homes, in our office, and at local sites, including the Braille Institute, Friendship Manor, Vista del Monte, Villa Santa Barbara, Villa Carridad, Garden Court, Heritage House, Maravilla and the Parkinson's Society.

We also offer educational programs covering topics such as nutrition, stress management, dementia, depression, physical exercise, end of life issues, navigating the health insurance system and other critical issues. In September we launched a new program whereby trained volunteer counselors place daily telephone calls to seniors who are homebound or otherwise in need of reassurance. This program is called CareLine.

CSA is a founding partner of the Santa Barbara Village, a program modeled after the Beacon Hill project of Boston, which enables seniors who choose to remain in their homes, do so as safely and independently as possible. We continue to be a collaborating partner in their venture.

**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?** CSA does not compete with any other agencies. We work closely with, RSVP, New Beginnings Counseling Center, Community Counseling and Education Center, Visiting Nurses and Hospice Care, Hospice of Santa Barbara, Sansum Clinic, the Braille Institute, Antioch University, Jewish Family Service and Catholic Charities, among others. We receive an average of 75 referrals each year from various community based sources along with over 30 referrals we have received from people who have read our newspaper in the last 6 months.

## Funding Request

**1. What need or problem does your project work to address?** There are thousands of seniors in our community who live alone and have no family or an adequate support system. They suffer tremendous social isolation and the quality of their life diminishes. Frequently, depression and anxiety begin to take hold as the senior attempts to compensate with this limited life style. We also find substance abuse and prescription drug abuse with this population of seniors. For the past 20 years the Center for Successful Aging has combated this issue and helped seniors remain independent and in their homes by providing senior peer counselors who make personal connections with them and help them navigate life's challenges. We assist seniors in finding community resources and we help seniors create a stronger sense of community in general by interacting on a more regular basis with other seniors.

**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 our center's clinical services is to ease the emotional and psychological burdens that aging brings to seniors and their families. To achieve this end we need to increase the training to our volunteers, expand our capacity and provide high quality assessment services. By hiring a doctoral level psychotherapist we have on staff an experienced clinician who can use the weekly supervision sessions for ongoing training and education of our volunteers. Having increased our volunteer cadre of counselors from 26 to 40 in the last year we are continuing to absorb more referrals and new clients. The new Executive Director has revamped the assessment tool that we use and he completes a 45 minute assessment session with each new client before they enter the program.

A specific outcome that is intended for the coming year is to provide high quality counseling services to at least 175 clients during the year. A client satisfaction survey has been developed to monitor the quality of services that our clients experience during their time at the Center.

**3. Describe your project or the capital items requested.** This is a request for \$10,000 to support the operating costs for the essential services that we offer to seniors in the greater Santa Barbara area. Funds are critical to improve our core operations as demand particularly from low-income clients for peer counseling continues to rise. These core services are:

- *Individual Peer Counseling:* Our trained counselors, who are also seniors, offer critical support to other seniors who much prefer talking with someone of their own generation who can truly understand the challenges of aging. One client, a 93 year old woman living on her own, told our peer counselor last week that her visits are the highlight of her week. Overcoming her loneliness has kept her spirits high enough to continue living in her own home.
- *Peer Group Counseling:* We have many necessary support groups, including two groups that we call "Betwixt and Between" designed for adult children of aging parents and a group of caregivers of Parkinson's patients. Seniors use our group sessions for information exchange, emotional support and for finding new strategies for balancing their personal needs and the care giving requirements they face. For many of them, it is the first opportunity they have had to share their difficult life situation. In a supportive group setting, seniors find others facing similar issues and find strength in sharing and learning. It is also validating and empowering to learn from others and to discover that they are not alone facing the same concerns that others have.
- *Educational Programming:* Our *Pro-Active Aging* series presents experts who lead discussions on topics that are vital for healthy aging. People who attend these presentations are often the families and caregivers of our seniors and have told us how important it is for them to gather this information. In addition the Center publishes a senior newspaper every other month called

“Successful Aging” where seniors gain important information about pressing issues they face such as financial fraud, end of life concerns, public policy debates as well as enriching stories where seniors make a difference in our community or tell their story of how they are aging successfully.

- *CareLine Reassurance Calls:* CSA has a new telephone program whereby counselors place daily calls to seniors who may be frail, homebound or otherwise in need of reassurance. For some seniors, this may be the only contact they have with another person. If necessary, an emergency call can be made, and attention received immediately. Like all of our programs, a CareLine call is free of charge to the client. *This is an innovative program that is not now available anywhere else in Santa Barbara County.*

Funding will go directly toward training seniors as volunteer counselors, CareLine callers and support group leaders. This grant would also support our *Pro-Active Aging* education series, including outreach, advertising, facility rental and honorariums for guest speakers.

By providing these vital programs and services, we make a crucial difference in the lives of over 150 Santa Barbara seniors each month. For example: a client in her late 80's was unhappy with the quality of life. After our peer counselor met with her and began asking some questions to her daughter, it seemed clear that the client needed a second opinion about the medications she was receiving. The client who is Hispanic felt afraid to express her needs directly to the doctor. Issues of low self esteem had plagued her most of her life. Her peer counselor was able to encourage her to find her voice, talk more openly with her daughter and eventually she changed doctors.

An additional program benefit is the good our Center does for the people who volunteer. Many seniors still feel vibrant and strong and feel unwelcome in the working world. Become a peer counselor gives them an encore career and added life meaning. By supporting a fellow senior, the lives of the counselors are greatly enriched by the feeling that they are able to remain vibrant and give something back to their community.

The ranks of elderly low-income seniors will continue to grow. In Santa Barbara County, there are 64,922 residents over the age of 60, more that 15% of the county's population. These numbers will continue to grow as the baby boom generation ages and economic conditions continue to devastate seniors, particularly those already struggling to meet daily needs.

**4. If this is a request for General Support, what are your organization's most pressing needs?** Our request is for support of two specific programs of the Center; its Senior Peer Counseling and its CareLine reassurance program.

**5. How do you plan to evaluate the effectiveness or impact of the grant?** CSA has a data collection and data base management system to measure and report client activity and demographic information. The Executive Director meets weekly with all the counselors to review case files, make recommendations and provide ongoing training as necessary so that we can achieve our objectives. We also track how many participants attend our educational initiatives on sign-in sheets.

We evaluate satisfaction forms that we've received from clients and agencies who have referred clients to us. We also seek feedback from individuals in the community. *Our evaluations show that 90% of clients rate our services as excellent, and 10% give us an average-to-good rating.*

**6. 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.** The Center's Executive Director is Gary Linker, Ph.D. M.F.T. He creates, develops and evaluates CSA's counseling and support services as well as all educational presentations, workshops and classes. Dr. Linker is an experienced psychotherapist having been a licensed Marriage, Family Therapist for the past 35 years. He is the co-founder of Pacifica Graduate

Institute and is the founder of New Beginnings Counseling Center. He has trained and supervised over 1,000 people during his long career as a therapist.

We work closely with all of the major senior social service providers including Visiting Nurses and Hospice, Coast Caregivers, Jewish Family Service, Family Service Agency and Hospice of Santa Barbara. We make relevant referrals to each other and make use of each organization's staff of professionals to provide ongoing training to our peer counselor volunteers.

**7. If full funding is not available through this request, how will you proceed? Please explain.** We are dedicated to raising funds for our core operations but are facing difficult times as many foundations choose medical safety-net organizations over organizations such as ours, which deal with critical mental health needs. As a provider of services at no cost to the client, we need to fund our core services with local foundation grants, individual and corporate donations and through fundraisers. If full funding in this request is not available, we may need to scale back our services, leaving a hole in the safety net for seniors in Santa Barbara.

CSA has held a fundraiser in the fall each year for the past three years. It is planning its first spring event on April 21<sup>st</sup> at the Unitarian Society featuring a senior English Brass Group as its entertainment. While appealing to foundations for support, the Center's board knows the importance of individual initiatives to raise needed funds.

**8. Is there any other pertinent information you feel we should know?** The Center for Successful Aging is excited about the growth of its programs, its new CareLine initiative and the creation of the community's only senior newspaper. We are the only agency providing no cost counseling to seniors in need. We are preparing ourselves for the influx of seniors who will be in need of services in the future and hope that the St. Francis Foundation will continue to be a partner supporting this important work.

## Center for Successful Aging Board of Directors

Name	City	Zip	Gender	Race/ Ethnic	Years on Board	Occupation/ Affiliations
Bobbi Kroot, President	Santa Barbara	93108	Female	White	4	Teacher
Laurie Leighty, Treasurer	Santa Barbara	93101	Female	White	4	Banker
Gayle Golden	Santa Barbara	93109	Female	White	4	Lawyer
Lynda Fairly, Secretary	Santa Barbara	93105	Female	White	3	Retired Educator
Frank Newton	Santa Barbara	93105	Male	White	2	Journalist
Eilene Bruce	Santa Barbara	93103	Female	White	3	Bus. Owner
Marty Golden	Santa Barbara	93109	Male	White	4	Bus. Owner
Wilma Chortkoff	Goleta	93110	Female	White	3	Retired
Jeanne West	Santa Barbara	93109	Female	White	3	Consultant
LaShon Kelley	Santa Barbara	93108	Female	White	3	Retired
Rochelle Rose	Goleta	93117	Female	White	1	Non-Profit Executive
Mark Levine	Santa Barbara	93108	Male	White	4	Businessman
Eric Kronvall	Santa Barbara	93108	Male	White	3 mo.	Banker
Michael Hutchings	Santa Barbara	93105	Male	White	3 mo.	Chef

How often does the board meet?

The Center's board meets monthly on the 2<sup>nd</sup> Thursday of the month.



**Center for Successful Aging**  
**Profit & Loss YTD Comparison**  
 December 2011

	Dec 11	Jan - Dec 11
<b>Ordinary Income/Expense</b>		
<b>Income</b>		
Auction Income	208.00	6,367.50
Donation - Restricted	0.00	500.00
Donation - Unrestricted	6,503.00	15,349.00
Event Tickets	0.00	8,940.00
Grant Income	5,000.00	11,500.00
In-Kind Service Donation	150.00	9,200.00
Newsletter Ad Income	450.00	2,625.00
Sponsorship	0.00	11,450.00
Training Income	75.00	75.00
<b>Total Income</b>	<b>12,386.00</b>	<b>66,006.50</b>
<b>Expense</b>		
Advertising	0.00	104.00
Bank Charges	178.27	701.80
Dues & Subscriptions	0.00	45.01
Event Expenses	0.00	14,409.88
Insurance	0.00	2,950.00
Internet Hosting	55.17	235.17
Meetings/Conferences	0.00	163.57
Office Supplies	0.00	420.95
Postage	307.78	2,392.60
Printing and Reproduction	1,606.62	6,212.10
Professional Fees		
Accounting	150.00	1,800.00
Clinical Ed/Outreach	4,400.00	42,480.00
Editor	400.00	1,200.00
Grant Writing	0.00	3,386.25
<b>Total Professional Fees</b>	<b>4,950.00</b>	<b>48,866.25</b>
Rent	720.00	8,640.00
Tax & License	0.00	35.00
Telephone	0.00	1,305.28
<b>Total Expense</b>	<b>7,817.84</b>	<b>86,481.61</b>
<b>Net Ordinary Income</b>	<b>4,568.16</b>	<b>-20,475.11</b>
<b>Other Income/Expense</b>		
<b>Other Income</b>		
Interest Income	3.96	86.34
<b>Total Other Income</b>	<b>3.96</b>	<b>86.34</b>
<b>Net Other Income</b>	<b>3.96</b>	<b>86.34</b>
<b>Net Income</b>	<b>4,572.12</b>	<b>-20,388.77</b>