

Cover Sheet- (One Page Maximum)

Funder you are applying to: St. Francis Foundation
Legal Name of Applicant Organization: AIDS Housing Santa Barbara, D.B.A. "Sarah House"

Contact Person & Title: Kristin George, Development Coordinator
Phone: 805-882-1192 Fax: 805 965-2252 Contact Person's Email: Kristin@sarahhousesb.org

Program Name/Capital Request: Sarah House program

Funds will pay for: Certified Nurse Assistant and House Manager position salaries, taxes and benefits
Full Mailing Address: P.O. Box 20031, Santa Barbara, CA 93120

Location(s) if different from above: 2612 Modoc Road, Santa Barbara, CA 93105

Executive Director: Randall B. Sunday Email: Sunday@sarahhousesb.org

Fax: (805) 965-2252 Phone: (805) 882-1192

Website: www.sarahhousesb.org

Tax-exempt Status: {Most funders require 501(c)(3) status. Check this requirement before applying}
 501(c)(3) Granted Other: _____ Tax ID Number: 77-0224415

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: \$60,000 Of Total Budget: \$915,000

Funds will be used from: 7/1/2011 (date) To: 6/30/2012(date)

Total Organizational Budget -Current Year: \$915,000 Agency fiscal year begins: July 1

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

Sarah House provides holistic and compassionate end-of-life care to the homeless and low income in the greater Santa Barbara area and 24 hour residential care for the low income who are living with or dying from HIV/AIDS.

Summarize your grant request (two to three sentences):

We request funding for general operating support for Sarah House. Funding will primarily fund supplies such as food and medical expenses and salaries for 12 Resident Assistants, 1 Assistant House Manager and 1 House Manager. Since our caregivers provide the primary service to our residents, supporting our staff is crucial for us to continue our end-of-life care program. We would like to apply specifically for the Andreoli Endowment Fund, which is designated for end-of-life care for the poor.

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:

Rick Knowles, Board President 3/30/2012 
Name of Authorized Board/Governing Body Representative Title Signature Date

Randall B. Sunday, Executive Director 3/29/2012 
Name of Lead Staff Member (or 2nd Representative) Title Signature Date

Proposal Narrative

1. Your organization's history and accomplishments.

Since 1989, Sarah House has provided housing and end-of-life care for low-income individuals with HIV/AIDS. In 2005, we successfully wrote and passed legislation (AB 2352) which allowed us to expand our care to the non-HIV dying poor, regardless of their ability to pay. The increase in residents who pass through our doors each year reveals the sustained and dire need for a hospice residence solely for the poor in our community. Since 2005, we have cared for over 450 residents (counting unduplicated residents only), over the course of approximately 14,000 bed days. We have sustained a 75%-85% occupancy level for the past 6 years, and in the first half of the 11/12 fiscal year have been filled at a 97% occupancy. Through our *social model* hospice, we create a homelike environment where each resident receives personal attention and unconditional love from our caregivers. We are unique in that we attend to the physical, psychological, and spiritual aspects of pain, death, and dying.

Though we remain a relatively small organization (enabling the intimate family structure of our program), our endowment and various special events sustain and ensure our future and have minimized the damage inflicted by the recent economic turbulence. However, in the past three years, we have had to twice dip into our endowment funds to secure the health of our organization. We are thankful for the foresight of Sarah House Directors a decade ago, who created this endowment, and wish to keep it intact to the greatest extent possible in order to ensure Sarah House's future.

To augment our income, we annually host the "Artizan's Ball," which successfully raises tens of thousands of dollars for Sarah House through auctioning donated art pieces from local artists. Our 2011 Artizan's Ball raised approximately \$85,000—nearly 10% of our budget. We also made innovative strides in 2009 by producing a play about Sarah House at Center Stage Theater; "One Day" subsequently won an "Indy" for "Best Original Play of 2009" and we have plans for a second play in the trilogy. CHAPCA (California Hospice and Palliative Care Association) also recently named Sarah House the **2010 Outstanding Program of the Year**.

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?

Sarah House is the only program of our agency, AIDS Housing Santa Barbara. We provide housing and end-of-life care for the low income and homeless 24 hours a day, 365 days a year. Residents must be "low income" as defined by HUD standards, earning less than \$43,000 annually. In reality, our residents fall far below the low income mark; in the first 6 months of the 11/12 fiscal the average income of our 21 residents was \$2,800, falling well below the "Extremely Low" category per the Santa Barbara Area Median Income Categories. We also provide 24-hour residential care to those with HIV/AIDS, though this constituency has decreased significantly since the advent of triple drug therapy. However, in the first half of 11/12, 20% of our bed days have been occupied by individuals living with HIV/AIDS, demonstrating a continued need for our services, especially as we are the only HIV/AIDS residence between Los Angeles and Sacramento. However, what is most important about our mission is that we care for those most in need in our community—the dying poor.

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?

We do not collaborate formally with any agency through contracts or memoranda of understanding. We have been working closely with partner organizations to ensure additional support, care, and counseling, especially for residents who may either suffer from substance abuse issues or mental illness. We work closely with VNHCSB (Visiting Nurse and Hospice Care of Santa Barbara), Hospice

of Santa Barbara (HSB), Cottage Hospital and their Palliative Care Team, Doctors Without Walls, the Neighborhood Clinics, Casa Esperanza and other shelters and homeless advocates. VNHCSB also provides the Registered Nurses who are required to attend each of our hospice residents. They have provided a similar service for our dying AIDS patients over the past 15 years and we have a strong relationship marked by mutual respect. In recent years we have approached both VNHCSB and HSB on several occasions to explore the possibility of financial and organizational partnership. They have shown no interest. The Dream Foundation provides air travel for family members of the residents, as well as weekly bouquets of flowers. We continue to be members of the county AIDS consortium monthly meetings and attend the Mesa Lane lunch meetings of agencies involved in service for the homeless.

Funding Request

1. Describe your program or the capital items requested, including:

- **Whether the request is new, ongoing or for expansion:** This request is ongoing.

What needs does this request address: Funding for our caregivers' salaries at Sarah House.

Target audience, including specific demographic information:

People who work in our field know how difficult it is to predict the trajectory of an illness; that even a hospice designation does not necessarily mean a resident will pass within six months. Thus, while there are so many unknown factors in how many residents will come to Sarah House and how long they will stay, we do know that we will continue to care for the low income and dying poor in our community as long as the need exist. In the first 6 months of this fiscal year, we have seen a trend of fewer residents staying for a longer period of time—a sharp contrast from last fiscal year, in which we had 77 residents who stayed for an average of 2 weeks. In the first half of the 11/12 fiscal year we have had 21 residents who have been at Sarah House for an average of 70 days—a bit over 2 months. These residents have been comprised of homeless persons (20%), persons with HIV/AIDS (24%), veterans (29%), and persons of Hispanic descent (33.3%). The increase of Hispanic residents is a very good sign for us. Over the years, we have worked hard to build a relationship with the Hispanic community, as it is more traditional for these families to care for their loved ones at home until the very end of their days. That Hispanic families are now beginning to recognize Sarah House as a safe and trusted space for their loved ones to spend their final days is a sign of our growth both culturally and communally.

Our sustained occupancy underscores the crucial unmet need that Sarah House fulfills for the indigent in our community. Our cost-effective structure, which utilizes Certified Nursing Assistants rather than Registered Nurses, enables us to care for the dying poor, even as the average financial contribution per resident is a mere \$17 per bed day.

2. In a short paragraph, tell us your organization's or program's goals and specific outcomes for the grant period. What activities and strategies will be used to achieve your stated outcomes? Please indicate a timeline for the main objectives of your proposal.

The primary goal of Sarah House is to care for every low income individual in need of our services so that he or she has the opportunity to pass from this life in an environment marked by peace and dignity rather than isolation and despair. Sarah House's mission of "extraordinary kindness" provides our residents a path to a "good death." By sustaining a homelike atmosphere that welcomes and accommodates family and friends, we celebrate the life of each resident—helping them truly live out their final days rather than merely keeping them alive.

For fiscal year 2011-2012, we seek to serve between 55-60 residents with a sustained occupancy of 95-98%. We plan to maintain the employment of 14 Resident Assistants and 1 House Manager at Sarah House. Our RAs address all issues concerned with end-of-life care, including the medical, spiritual, and emotional aspects of death and dying. This holistic attentiveness permits the kind of personal attention that is rarely possible in other care facilities. Our care *is* our service and therefore supporting our caregivers in all aspects enables us to ensure the highest level of care and the highest

possibility of experiencing a “good death” for our residents. Since our attention to quality health care extends beyond the needs of our residents to the staff that cares for them, unlike most companies and non-profits, we provide full medical and dental benefits to our full time staff as well as a living wage.

Our timeline is ongoing. As long as there is a need for our end-of-life care, we will work hard to adapt our services to the changing needs in our community and keep our doors open to those who need this service the most: the dying poor.

3. How do you plan to evaluate the effectiveness or impact of the grant?

At Sarah House, we focus on helping our residents fully live their final days rather than merely keeping them alive. Since this grant will go towards the salaries of our caregivers, we will measure their performance through several means. One method will be the feedback we receive from the questionnaire we developed to send to loved ones as after a resident passes. Read below one daughter’s comments on how our caregivers helped her and her mother during her mother’s final days, including the spiritual nurturing she received: *“Sarah House is the best model of end-of-life care imaginable. My mother Estelle was truly blessed to be a part of your loving community. In her own way, she truly grew from the experience. Even though she was not a “spiritual person,” I think she became more loving through the love she received from the caregivers. I am eternally grateful to you and your staff, especially Debbie and Stephen, for their extraordinary wisdom and love.”* We count this positive feedback as evidence that we are achieving our primary goal of enabling a good death for our residents.

The steady demand for our end-of-life care since 2005 also demonstrates the successful impact of our program. In evaluating the effectiveness of our work, we rely on demographic data as well as anecdotal evidence from regular attendees at Sarah House, such as the clergy, doctors, nurses, families and friends as well as staff from other end-of-life care residences. We are also involved in several review processes: a representative from the Department of Social Services conducts an annual audit of our residence; our staff at Sarah House has three formal opportunities a day to participate in open discussions; and lastly, our House Manager monitors the residence and its daily activities while engaging in ongoing dialogue with our Executive Director.

4. Summarize the skills and relevant experience of key staff/volunteers essential to your organization’s or the program’s success. If your organization is collaborating with other organizations, note which ones and in what ways.

Randy Sunday has been an executive officer with non-profits for over 20 years and has served as Executive Director of Sarah House since 1997. He is currently one of the two most senior directors of Residential Care Facility for the Chronically Ill (RCFCIs) in California. He lobbied successfully for the creation of the state’s funding program for bed-day reimbursement for HIV/AIDS residences and also developed the legislation that allows Sarah House and all other AIDS residences to care for the non-HIV dying. He oversees all administrative activities, personnel supervision, and program development and evaluation, as well as directing all aspects of public relations, education and fundraising. He has long been a proponent of alternative treatments such as yoga, massage, and acupuncture in combination with standard medical means for persons suffering from AIDS.

Stephen Jones first came to Sarah House as a volunteer in 2005, became a full-time employee in 2007, Assistant House Manager in 2009 and as of January 1, 2012 serves as our full time House Manager, succeeding the retirement of Debbie McQuade, who had been House Manager for 20 years. He recently received his Doctorate of Depth Psychology from the Pacifica Graduate Institute in 2011. He supervises all activities in the house involving residents, staff and volunteers. Our 12 volunteers take part in a wide variety of chores, such as spending time with our residents, preparing meals, cleaning, providing transportation, gardening, shopping, etc. Stephen ensures that the requirements of a state-licensed facility are met, while also instilling an atmosphere of friendship and loving care. His presence and that of all the staff make Sarah House feel like a close-knit family. There are 15 Certified

Nursing Assistants and caregivers on staff who care for the residents at Sarah House. On average, each has worked there for over five years and is deeply committed to the mission of the agency. They are integral in creating an environment filled with love and care for the residents.

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

In order to obtain the necessary revenue to carry on our end-of-life care services at Sarah House, we are cultivating all funding sources possible— private foundations, government agencies, individual and corporate donors, and special fundraising events. We already have our government funding secured for 11/12 and will continue to seek out new foundations for funding this fiscal year. If we do not receive this grant, we will be forced to draw from our endowment, which we have already had to do several times since the economic downturn.

6. Is there any other pertinent information you feel we should know?

CHAPCA (California Hospice and Palliative Care Association) recently named Sarah House the **2010 Outstanding Program** at its annual conference in Las Vegas last October. The Award for Outstanding Program Achievement was created in 2004 to recognize a program or agency that has created and implemented an innovative program in end-of-life care.

The nominating letter noted foremost the compassionate nature of the Sarah House environment and philosophy: "Perhaps what I value most about Sarah House is its heart. It is a place of sanctuary and warmth for the residents, their families, and the staff. The people who work at Sarah House view this heart-opening work as their calling, and several have worked there for 5, 10, even 20 years."

Indeed in the questionnaires we have sent to families in recent months, we have received feedback that further supports and clarifies this "heart." One daughter remarked that, *"In absolutely every way, your staff and volunteers provided comfort, understanding, respect, and guidance. I've been thinking that your experience has provided excellent care and service by KNOWING how, what, and when to do and/or say what's needed in the moment--helping cope with the "why" as gently and confidently as you do is of immeasurable value to us as the family. My only regret, in defiance of reality, is that our time at Sarah House was so short."*

Another woman said of her friend's care that, *"I have learned that the meaning of extraordinary kindness at Sarah House is something that we should all incorporate into our lives, in all our interactions with others. I saw the unconditional love and acceptance open the heart of my friend Barry Spencer in his last days and touch the hearts and minds of all his friends who witnessed the many acts of love he received. I have learned so much about life through witnessing his passage to death and beyond. Thank you from the bottom of my heart for giving my friend so much, as he had so little. What you do at Sarah House is a calling of the highest order."* Truly we receive this feedback as evidence that we are doing our best to provide compassionate and holistic end-of-life care for the most vulnerable individuals in our community.

Board of Directors/Governing Body

Directions: Attach additional sheets if necessary.

Name	City	Affiliation/Profession	Board Position	Yrs. of Service
Rick Knowles	Santa Barbara	Retired Marketing Executive	President	4
Jean Lange Davis	Santa Barbara	Retired Public Administrator	VP/Secretary	5
Cathy Walker	Santa Barbara	Non-profit Accountant	Treasurer	3
Hallie Anderson	Santa Barbara	Special Events Manager	Member	5
Serena Carroll	Summerland	Therapist/Writer	Member	4
Harry Weisbart	Santa Barbara	Retired Market Executive	Member	3
Carrie Vuich	Carpinteria	Spa Manager	Member	3
Karen Borick	Santa Barbara	Retired Designer	Member	2
Linda Lorenzen-Hughes	Santa Barbara	Realtor	Member	1
Fritz Krainer	Santa Barbara	Engineer	Member	1
Lori Lewis	Santa Barbara	Estate Planning Lawyer	Member	1
Susan LeVine	Santa Barbara	Artist	Member	1

How often does the Board / Governing Body meet? The 3rd Thursday of each month.

Applicant name: AIDS Housing Santa Barbara, D.B.A. "Sarah House"

Organization Financial Summary

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

Organization Name: AIDS Housing Santa Barbara, DBA "Sarah House"

Fiscal Year Dates July 1, 2011 – June 30, 2012

INCOME

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

Source	Prior Year's Actual (\$) [6/30/11]	Projected Annual Budget (\$)	YTD Actual (\$) [1/31/ 2012]
Rents and Subsidies	133,079	105,000	67,038
Government Grants	126,249	110,000	91,291
Private Foundations	397,612	360,000	183,295
General Donations	107,136	110,000	67,673
Special Event	122,268	175,000	105,919
TOTAL INCOME	\$886,344	\$860,000	\$515,216

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 (\$) [Jun 30,2011] (date)	Annual Budget (\$) 2011/2012	YTD Actual (\$) [1/31/2012] (date)
Auto Expenses	2,030	2,000	1,113
Dues & Fees	650	500	418
Fundraising	35,396	34,500	30,073
Insurance	7,416	8,000	4,847
Office Expenses	11,907	10,000	7,586
Office Rent	12,000	12,000	7,000
Payroll, taxes, benefits, insurance	804,356	752,300	462,279
Professional Fees	14,795	15,000	8,284
Repairs & Maintenance	14,822	14,000	4,623
Food & Supplies	21,260	22,000	11,815
Scattered Site Rent	12,285	12,200	9,727
Training & Travel	1,446	500	0
Utilities	31,560	32,000	19,748
NET PROFIT OR LOSS	30,691	915,000	567,513

Total Capital Expenses	\$	\$	\$
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Applicant name: AIDS Housing Santa Barbara, D.B.A. "Sarah House"

Organization Balance Sheet Summary

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

ASSETS	MOST CURRENT (\$) [Jan. 31, 2012] (date)	PRIOR YEAR CLOSE (\$) [June 30, 2011] (date)
Current Assets		
Cash and Equivalents	61,381.20	32,451.26
Accounts Receivable	28,116.54	11,277.45
Prepaid Expenses	5,759.09	5,759.09
Inventory		
Grants/Pledges Receivable		
Other		
Fixed Assets (Net)	987,071.42	1,007,150.67
Property		
Buildings		
Equipment		
Investments	849,513.85	981,129.81
Endowments		
Other		
TOTAL ASSETS	\$1,913,842.10	\$2,037,768.28
LIABILITIES		
Current Liabilities		
Accounts Payable	12,905.96	14,241.80
Accrued Expenses	61,906.20	59,707.05
Long Term Debt (Current Portion)		
Short Term Debt		
Other		
Long Term Debt (over a year)		
Loan	457,722.46	448,122.46
Other		
TOTAL LIABILITIES	532,534.62	522,071.31
Net Assets	1,819,392.00	1,819,392
Unrestricted		
Temporarily Restricted		
Permanently Restricted		
TOTAL LIABILITIES AND NET ASSETS	\$1,931,842.10	\$2,037,768.28