



# Sarah House

*A Home for the End-of-Life-Care*



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Debbie McQuade  
*Executive Director*

Stephen Jones, PhD  
*House Manager*

*Honors*  
CHAPCA's 2010 Outstanding  
Program of the Year Award

Heroes of Hospice  
Professional Award

February 16, 2015

Debbie Cloud  
Executive Director  
St. Francis Foundation  
2323 De La Vina, Suite 104  
Santa Barbara, CA 93105

Dear Debbie,

Greetings from Sarah House! We hope the year has begun well. Sarah House is beginning to plan a small celebration of its 25 years of service in Santa Barbara. We hope that the St. Francis Foundation, which has supported our work not only financially but in shared spirit, will be a part of this. Details to follow as soon as they are finalized.

Meanwhile, the work of Sarah House itself continues. A little past mid-year, we are ahead of our projections for our care of the dying as well as our support of a small number of people with HIV/AIDS. This morning, one of our residents died. "It was so smooth," according to Maria, the Resident Assistant who had spent the night sitting next to his bed. Although death comes for everyone, it is also true that no two deaths are the same. "Art" was diagnosed with a scalp cancer that involved a large part of his head and neck. He arrived at Sarah House wearing a tall green top hat in order to disguise what had already become an enormous growth on the top of his head. That green hat may have seemed bright and gay but it was a constant reminder of Art's own grief about his impending death. We were all relieved that the end, when it came, came and went quickly – Just as Art had hoped it would: a final week with his visiting son, a Sunday lunch, a difficult Monday afternoon, but then a deep sleep and apparent ease.

Debbie, this letter accompanies our application for a St. Francis Foundation Grant for the current fiscal year. We appreciate and count on the fact that the ideals of the Foundation mirror our own. Telling the story of our work with the dying poor in a community where so much good work is being done and where there is sometimes ambivalence about the marginalized and their place remains a challenge. Then there is the fact that we receive no MediCare or MediCal reimbursement. It is a relief when our Mission is clearly understood and supported.

Please thank the Board of Directors for the grants of the past. Of course, we hope the Foundation finds this application worthy of continued funding.

Sincerely, *Debbie*

Debbie McQuade, Director, Sarah House



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Professional Award**

February 13, 2015

Debbie Cloud  
Executive Director  
St. Francis Foundation  
2323 De La Vina, Suite 104  
Santa Barbara, CA 93105

Regarding: Grant report

Dear Debbie,

Because the Foundation has moved forward its application date, we thought it best to bring you up-to-date since the time we have received a grant in 2014. As always, it has been an eventful year. Sarah House continues its daily Mission while working on strengthening its organizational support.

The numbers of people served last year (77) and mid-way through this year (49) remain high. We think it would be accurate to say that the aging of the Baby Boomers has made a strong impact on hospice work. We have remained fully occupied with relatively short stays of care. Also the number of Latino Residents has increased to a range between 20 and 25%. This may indicate that, locally, participation in hospice services by the Latino community has turned a corner. Meantime, our service of the Homeless community remains at about 20% as it has been for several years.

As already stated, time-of-residency has become shorter. The House Manager, working with collaborating agencies, has effectively managed to provide end-of-life care for men and women who are in the last weeks of their lives. Working with Case Managers, Stephen Jones has become adept at determining when it is best for folks to move to Sarah House for end-of-life care. This has kept our work available to a greater number of applicants by increasing ongoing opportunities for residency.

Additionally, we continue to offer care for a small number of people with HIV/AIDS, 5-8 annually. Each of these people has been seriously disabled when they came to Sarah House. However, for the past 30 months, none has died. Sarah House has provided attenuated care, collaboration with the Infectious Disease Department at Public Health, opportunities for mental health care, daily support for psycho-social need perhaps best addressed by the normalcy of community life. Each of the HIV+ folks has returned home to productivity and, hopefully, a long life.



Through the several decades of our service to individuals and also the Santa Barbara community, we have taken our unique place on the continuum of care. No matter what, the work of first Heath House and now Sarah House has continued uninterrupted. In a very basic way, this work has not changed since that first day in 1991: people come into our home; we provide them with skillful care in an atmosphere of what we have named "extraordinary kindness;" and then they die. Such is our work.

Two of the Residents were Moderate Income; 3 were Low Income; the rest have been Extremely Low Income. All were physician-certified as hospice (or HIV) appropriate.

The Staff has been stable. We have had almost no new hires. We think this has resulted in an increased level of commitment to our work and, if anything, a higher level of care through training and shared experience. Last year at this time, we had recently promoted a long-term Caregiver to the position of Assistant Manager. This has worked out well and she has grown into the skills necessary for this position while providing much-needed respite for the full-time House Manager.

The annual Sarah House fundraiser was successful, raising significantly more funds than expected. Many old friends from our Heath House came forward to help with sets and decorations. The Western theme seemed to entice a record number of attendees.

The Board of Directors, under the leadership of Cathie Walker, has been exploring ways to create higher standards for Board participation. Board members are actively involved in creating a second fundraiser, administrative support and bereavement surveys. A Board Committee is working to create the best plan for the disposition of Heath House which we own but now operate as landlord only. There is an active Investment Committee which meets quarterly with the portfolio manager.

At the same time, Cathie Walker has brought in several guest speakers who have presented at Board Meetings, including Peter MacDougall and Ann Sobel. A champion of "process," Cathie has hired Jennifer Freed (AHA Founder) to outline for the Board the concept of "Council," with an opportunity of adapting it as a Board of Directors policy.

Financially, Sarah House is stable. A late-in-the-year challenge arises from the fact that Cottage Health Systems, which has for several years provided restricted Community Partnership Grants, is restructuring its program and will not be offering this opportunity during this fiscal year. We are hoping that our grant applications (St. Francis among them) will be approved and a short-fall will be averted,

In the meantime, in late Spring or early Summer, we will be hosting a small celebration of our 25 years of work in Santa Barbara. As Anthony Abbriano, a Resident from long ago, put it so well: "It has been a joy."

Thank you to the St. Francis Foundation for being a partner in our work.

Respectfully,

A handwritten signature in cursive script, reading "Deborah McQuade".

Deborah McQuade  
Sarah House Director

# The Foundation Roundtable: Common Grant Application

## Cover Sheet

Foundation you are applying to: St. Francis Foundation  
Legal Name of Applicant Organization: Sarah House Santa Barbara  
Project Name (if applicable): Sarah House  
Funds will pay for: General Operating Funds  
Full Mailing Address: P.O. Box 20031; Santa Barbara, CA 93120  
Location(s) if different from above: 2612 NODOL; SB 93105  
Executive Director: Deborah J. McQuade  
Phone: 805.682.1515 Fax: 805.563.4761  
Email: office@sarahhousesb.org Website: www.sarahhousesb.org  
Contact Person & Title: Debbie McQuade Phone: 805-682-1515

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: 77-0224415 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: \$ 65,000 Total Project Budget: \$ 783,204

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

Total Organizational Budget for Current Year: \$ 783,204 Fiscal year begins: July 1

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

Sarah House provides a home and end-of-life care to people of low income as well as caring for men and women with HIV/AIDS. Additionally, it offers comfort and assistance to family and friends of its residents. It trusts that its community work adds to the body of hospice wisdom. All this is carried out with extraordinary kindness.

Summarize your grant request (two to three sentences):

We are requesting \$65,000 for General Support. If granted, the money will be used to pay the wages of our Spanish-speaking Resident Assistant Caregivers who provide round-the-clock care for our growing number of Spanish-speaking and Latino-cultured Residents and their concerned and affected families.

### 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:

<u>Cathie Walker</u> <u>President</u>	<u>Ceall</u>	<u>2/17/2015</u>
Name & Title of Authorized Board/Governing Body Representative	Signature	Date
<u>Sean Lange Davis</u> <u>Vice President</u>	<u>[Signature]</u>	<u>2/17/2015</u>
Name & Title of Authorized Board/Governing Body Representative	Signature	Date



St. Francis Foundation Grant Application  
Submitted by Sarah House Santa Barbara  
Common Grant Application

**Background**

1. Your organization's history and accomplishments. Sarah House' history begins as an intersection of a world-wide epidemic and the response of the Santa Barbara community. Its early days were perhaps a good example of a variation on a theme: all pandemics are local. In the late 1980's, Alice Heath, a 75 year-old retired Public Health Professional, read about what had become known as the AIDS crisis. Its impact on Santa Barbara County was indicated by HIV infections in the hundreds. Alice, as the story goes, looked up from her newspaper and said, "Those young men are not going to have any place to die." She realized that many of those infected were in their twenties and thirties; they were without retirement or death benefits. And to make things more harrowing, many had been rejected by family and friends. So Alice gathered together a small group of powerful people – Mayor Harriet Miler, Interior Designer Dough Bartoli, Philanthropist and Social Activist Sarah Shoresman and Attorney Don Kuhn – and made plans to buy a house. By 1991, Heath House had opened and for years was the place where people with HIV came for care and affection and soon to die. With the advent of powerful new medications in the later 1990s, the need for supportive housing for people with AIDS dramatically decreased. With the help of Gail Rink and Dr. Steve Hosea and Hannah-Beth Jackson, Sarah House worked legislatively to expand its work to include a mission to care for the dying poor in the Santa Barbara Community. Its work has been recognized on both State and local levels. Sarah House is a founding member of a national movement to encourage and mentor other social model hospices.
2. Your current program and activities, etc. Today Sarah House cares for both groups of people: the dying poor and those infected with HIV/AIDS. People from Santa Barbara come to Sarah House during the last weeks of their lives to find skillful care and, just as important, emotional peace. All of these people are Low Income, as defined by HUD published figures. 90% are Extremely Low Income. All are hospice-certified. For reasons that have a great deal to do with economic disadvantage, people come to Sarah House for end-of-life care because they have neither a place nor a people to help them in their final days. For the last several years, the demographics have been stable with 65+/- hospice residents; 20 of whom are homeless; 20 of whom are veterans; many of whom have struggled with substance abuse or mental health issues; most of whom are elderly. They find in Sarah House a beautiful home, their own bedroom, a skillful staff and loving companionship. Each year 5-7 people are HIV+.
3. Professional relationships. One of a handful of social model hospices in the United States, in Santa Barbara Sarah House alone offers exclusive care to the dying poor. It works with and has MOUs with Pacific Pride, Visiting Nurses, Assisted Home Hospice, as the well as Hospice of Santa Barbara. It also works collaboratively with Cottage Health Systems, Casa Esperanza and the Public Health Department.

## Funding Request

1. What need or problem does your project work to address? Simply put, Sarah House addresses the very real problem that low income people of the Santa Barbara community often spend the final phase of their lives lonely and alone and facing the time of their death without skillful and compassionate care. Sarah House, both by its history as a home for people dying from HIV/AIDS and also by its ongoing focus and intent to create a community of kindness and compassion for the dying poor, addresses all of these issues.

While concerns about end-of-life and dying may be universal, it is also true that those who are homeless carry an extra burden. Every year approximately twenty come to Sarah House "from the streets." Unable to negotiate a successful life, these men and women at life's end are dependent on the stability of others to negotiate good care and support for their final days. Often the beauty of Sarah House and the kindness of the Staff have inspired these residents to say, "To think it would take the end of my life to find what I really needed all along."

Additionally, low income folks – homeless and otherwise – do not have the financial resources required to hire caregivers. Their families are most often also low-income and their abilities to "pitch in" are meager.

Finally, mental health issues and substance abuse problems seem to be over-represented in the dying poor who come to our door. Although Sarah House Caregivers are not licensed, their dedication and skills have been able to facilitate remarkable success in the care of people with these issues.

Over the past few years, the number of Latino residents has risen from 5% to 20%. Because this is still below local demographic representation, Sarah House has acknowledged the need to provide Spanish-speaking and culturally appropriate caregivers during each shift. It has already moved forward by hiring and training an increasing number of appropriate Staff.

2. Tell us your project's specific goals and outcomes. Sarah House projects caring for 65 men and women during each fiscal year with the outcome of opportunities for skilled care and a nurturing community life. In addition, it projects caring for 6 people living with AIDS. 100% of these will be low-income and unable to care for themselves or arrange for their own care among family and friends. The goal for our hospice patients is to provide for them the circumstances that will make it possible to have a Good Death. The goal for the HIV residents is that they will return to health and well-being.



3. Describe your project.

- Sarah house is an ongoing project.
- The target audience is 1. ) low-income people at the end of their lives and 2.) low income people living with HIV/AIDS.
- 24/7/365 skillful care will be provided in the beautiful residence: Sarah House. Always the context will be what we think of as our highest ideal: extraordinary kindness. We do not see this as a platitude. Many times we have witnessed that kindness itself provides an unction which creates an atmosphere in which final weeks of life and dying itself reach an identifiable peacefulness; viz., a Good Death.
- The timeline is each day and every day. This is a residential program.

4. What is the most pressing General Support need? We are asking for General Support, the largest and most important line item of which is the Living Wages of our Resident Assistant Caregivers. They are the *sine qua non* of our Mission. Without them, there would be no important work of Sarah House. During this year we are particularly focusing on the work of our Spanish-speaking Resident Assistants and their importance to our work among Latino Residents as well as their families.
5. Evaluation of effectiveness? The House Manager and Resident Assistant Caregivers participate in on-going conversation with the people who live at the House. The Staff desires to know and provide the best ways to support the dying in terms of practical measures and emotional sensitivity. Who better to query than the people who are being cared for? As a result of these conversations, care in all its complexity is being constantly attenuated. Also professional collaborators (medical hospice team) provide daily observation and advice. Lastly, after the death of Resident, a carefully worded questionnaire is sent to surviving family members. The results of these surveys are studied by the Staff and reflected upon; changes are made when indicated. Sarah House is open to families of its Residents 24 hours a day. It is our hope that this practical transparency encourages 100% candor.
6. Skills and relevant experience. Deborah McQuade as Director is ultimately responsible for the project; she has been a part of the Mission since 1990, introduced personally to the founding vision of Alice Heath and Sarah Shoresman. Her 2004 Master's Degree provided the initial prototype for expanding the work of Sarah House to include general hospice work.



Stephen Jones is responsible for the day-to-day running of the House; as such, he oversees the care of the Residents, along with their well-being and that of their families. He also hires and trains the Staff and Volunteers. His 2014 PhD thesis articulated the ideals of a social model hospice and its function as “medicine” to its residents. He is a certified Residential Care Facility Administrator.

The Resident Assistant Caregivers are well-trained, intelligent and kind. Their first several weeks of employment include a specific Sarah House curriculum of 40 hour training and ongoing mentorship. Training is ongoing and documented.

Visiting Nurse and Hospice Care and Assisted Home Hospice provide Case Management for each hospice resident. Pacific Pride provides the same for HIV/AIDS residents who are not end-of-life. Hospice of Santa Barbara offers spiritual support to residents, their families and the Sarah House Staff.

7. If full funding is not available, what are the contingency plans? We are not able to modify services; to do so would be to step away from our own best practices and ideals. The St. Francis Foundation Grant is being applied for close to the end of our fiscal year. We are well aware of that and hope we have taken adequate efforts to write a compelling application. During each fiscal year, we try to raise more money than we thought we would raise, and to spend less. More than mid-year now, we are intent on that goal. One additional challenge is that Cottage Hospital, which has consistently offered a restricted grant for the past few years, has restructured its timeline; it appears that it may well be outside the current Sarah House fiscal year.

Contingency plans would be connected to potential for money raised at a 25<sup>th</sup> Anniversary Luncheon, which today is in its beginning stages.

*Funded this year or not, we want to say a hearty and sincere thank you to the St. Francis Foundation for its years of generous support. It is not taken for granted. It is deeply appreciated. The Foundation has shown a clear understanding of our Mission and has supported it consistently. We thank you.*

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## Board of Directors/Governing Body

[illegible]

Revised January 2014



# The Foundation Roundtable: Common Grant Application

## Project Budget

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

Organization Name: Sarah House Santa Barbara

Name of Project (if different): Sarah House

Budget dates for grant period: 7/1/2014 to 6/30/2015

### **INCOME**

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

Source	Total Project (\$)	Pending (\$)	Secured (\$)	Notes
Events	105000		109147	Event planned for 4/2015
Rents and Subsidies	138224	54000	84642	
Government Grants	88480	40152	48328	
Unrestricted Grants	321500	100000	222000	St. Francis app included
Restricted Grants	30000			Unknown
Unrestr. Indi. Donations	100000		109389	Unknown
Investment Draw				
<b>TOTAL INCOME</b>	<b>783204</b>	<b>194152</b>	<b>573506</b>	

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
Caregiver Salaries	336000	65000	Largest and most important budget line item
Other Salaries and Benefits	226200		
Utilities	23800		
Programs/Property Expenses	58169		
Insurance	8100		
Fund Raising Expenses	42200		
Professional Fees	30800		
Operating Expenses	7225		
Scattered Site Expenses	12540		
Depreciation	27000		
<b>TOTAL EXPENSES</b>	<b>772034</b>	<b>65000</b>	

# The Foundation Roundtable: Common Grant Application

## Organization Financial Summary

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

Organization Name: Sarah House Santa Barbara Fiscal Year Dates: 7/1/2014 to 6/30/2015

### **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 [ 2/16/2015 ]
Events	79947	105000	109147
Rents and Subsidies	146921	138224	84641
Government Grants	108566	88480	48328
Unrestricted Grants	320500	321500	222600
Restricted Grants	48000	30000	0
Unrestricted Contributions	123351	100000	109380
Investment Draw			
Gifts in Kind	2168		2200
<b>TOTAL INCOME</b>	<b>829453</b>	<b>783204</b>	<b>576296</b>

List the In-Kind (non-cash) contributions: Easy Lift donated to us a Van

### **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 [ 2/16/2015 ]
Caregiver Salaries	327076	336000	183466
Other Salaries and Benefits	263522	226200	218833
Utilities	21800	23800	12619
Program/Property Expenses	55888	58169	37664
Insurance	7203	8100	5458
Fund Raising Expenses	23738	42200	23893
Professional Fees	32392	30800	19826
Operating Expenses	4536	7225	2862
Scattered Site Expenses	13555	12540	7315
Depreciation Expenses	27923	27000	15166
<b>TOTAL EXPENSE</b>	<b>777633</b>	<b>772034</b>	<b>527102</b>
<b>NET PROFIT OR LOSS</b>	<b>51820</b>	<b>11170</b>	

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.

<b>ASSETS</b>	<b>MOST CURRENT (\$)</b> as of [ 1/31/15 ]	<b>PRIOR YEAR CLOSE (\$)</b>
<b>Current Assets</b>		
Cash and Equivalents	309375	243002
Accounts Receivable	0	18490
Prepaid Expenses	1000	
Inventory	0	
Grants/Pledges Receivable	21474	13551
Other		
<b>Fixed Assets (Net)</b>		
Property	524875	524875
Buildings	381771	381127
Equipment	7485	9502
<b>Investments</b>		
Endowments	815452	810017
Other		
<b>TOTAL ASSETS</b>	<b>2061432</b>	<b>2000564</b>
<b>LIABILITIES</b>		
<b>Current Liabilities</b>		
Accounts Payable	31178	40931
Accrued Expenses		
Long Term Debt (Current Portion)		
Short Term Debt		
Other	3600	3600
<b>Long Term Debt (over a year)</b>		
Loan	492122	486522
Other		
<b>TOTAL LIABILITIES</b>	<b>526900</b>	<b>531053</b>
<b>Net Assets</b>		
Unrestricted	719515	654494
Temporarily Restricted	84974	84974
Permanently Restricted	730043	730043
<b>TOTAL LIABILITIES AND NET ASSETS</b>	<b>2061432</b>	<b>2000564</b>



Department of the Treasury  
Internal Revenue Service

P.O. Box 2508, Room 4010  
Cincinnati OH 45201

In reply refer to: 4077550286  
July 03, 2013 LTR 4168C 0  
77-0224415 000000 00

00035668  
BODC: TE

SARAH HOUSE SANTA BARBARA  
PO BOX 20031  
SANTA BARBARA CA 93120-0031



023794

Employer Identification Number: 77-0224415  
Person to Contact: Vaida Singleton  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Apr. 04, 2013, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in October 1993.

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.

Please refer to our website [www.irs.gov/eo](http://www.irs.gov/eo) for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.





STATE OF CALIFORNIA  
FRANCHISE TAX BOARD  
PO BOX 1286  
RANCHO CORDOVA CA 95741-1286

In reply refer to  
755:G :TS

March 16, 2000

AIDS HOUSING SANTA BARBARA INC  
PO BOX 20031  
SANTA BARBARA CA 93120-0031

Purpose : CHARITABLE  
Code Section : 2370ld  
Form of Organization : Corporation  
Accounting Period Ending: June 30  
Organization Number : 1460608

This letter confirms your previous exemption from state franchise and income tax under Section 2370ld, Revenue and Taxation Code. In confirming your exempt status, we have made no examination of your current activities. If the organization has changed its operation, character, or purpose since exemption was originally granted, that change must be reported immediately to this office.

You may be required to file Form 199 (Exempt Organization Annual Information Return) on or before the 15th day of the 5th month (4 1/2 months) after the close of your accounting period. See annual instructions with forms for requirements.

You are not required to file state franchise or income tax returns unless you have income subject to the unrelated business income tax under Section 23731 of the Code. In this event, you are required to file Form 109 (Exempt Organization Business Income Tax Return) by the 15th day of the 5th month (4 1/2 months) after the close of your annual accounting period.

Contributions made to you are deductible by donors as provided by

Sections 17214 through 17216.2 and 24357 through 24359 of the Code, unless your purpose is testing for Public Safety.

T SCHOCK  
EXEMPT ORGANIZATION SECTION  
PROCESSING SERVICES BUREAU  
TELEPHONE (916) 845-4171

RTF: