

## MANAGEMENT REPORT TO THE BOARD OF DIRECTORS

November 26, 2018

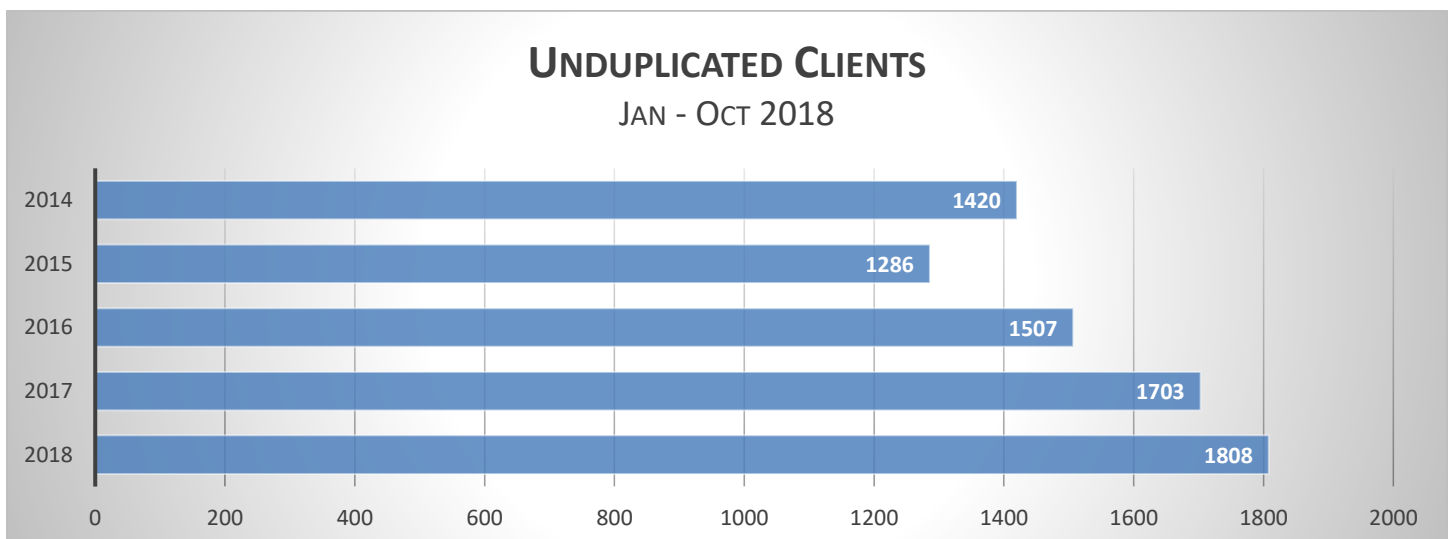
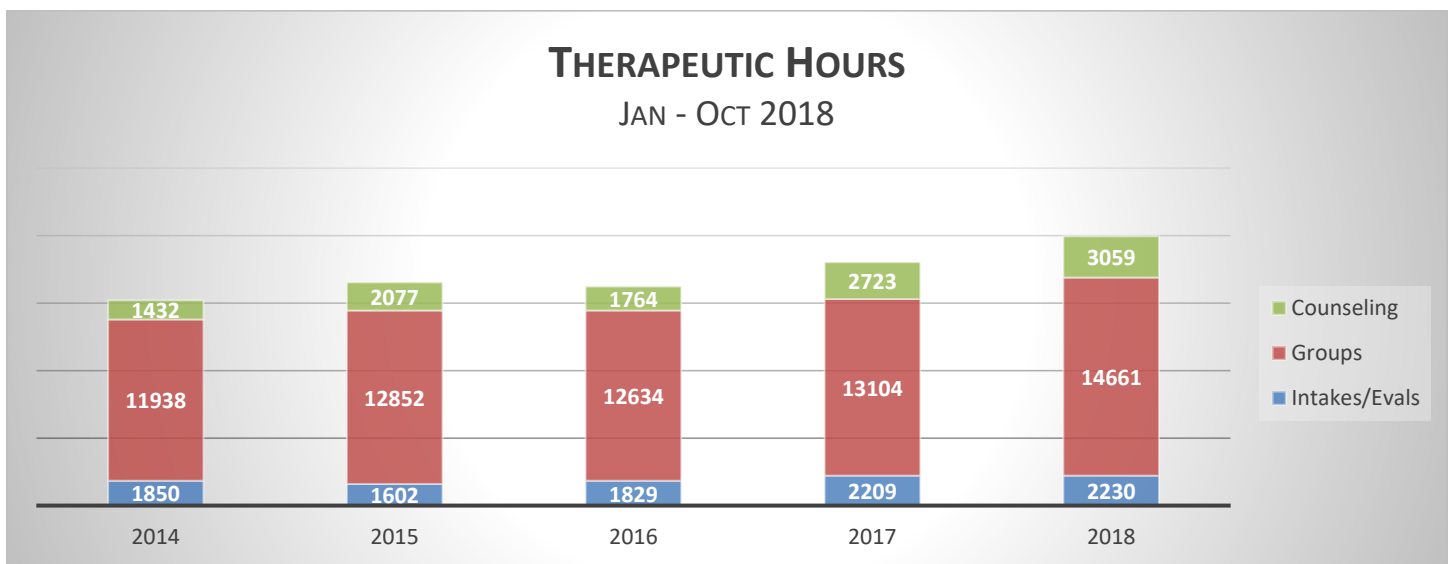
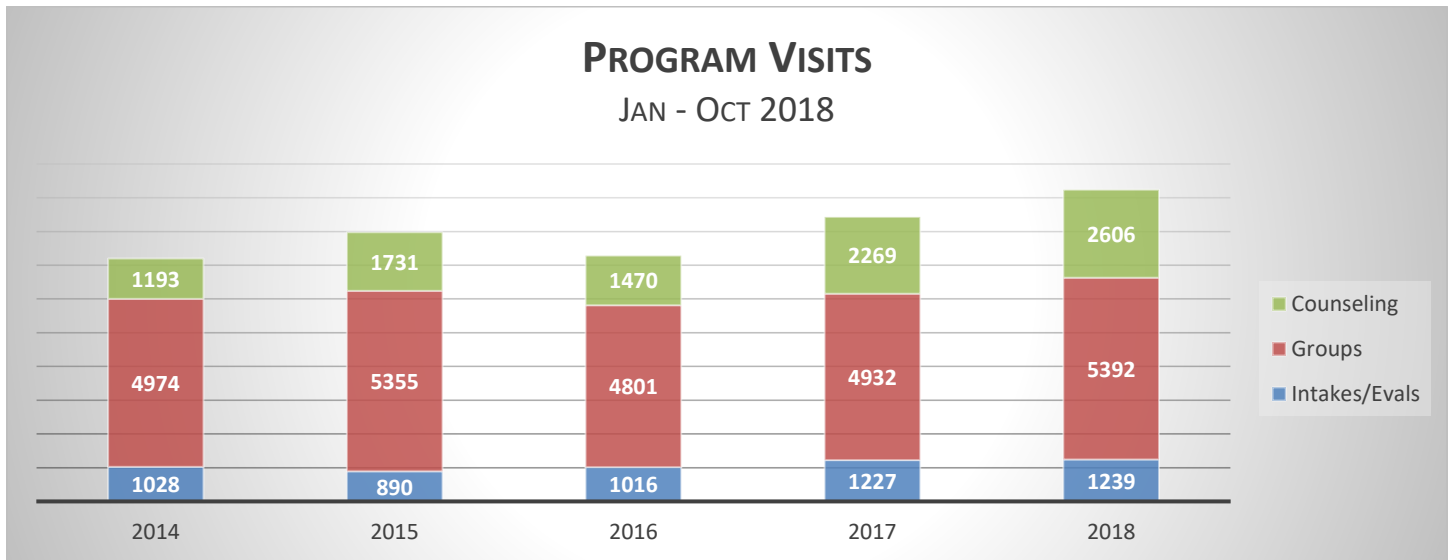
### Administration & Finance- Blair Thompson

- *Financial Statement Highlights (for period ending October 31, 2018)*
  - **Balance Sheet:** The Balance Sheet remains very strong.
    - *Accounts Receivable:* At the end of October, the billing/invoices for Methodist Healthcare Ministries (\$56K), the Valley Baptist Legacy Foundation (\$100K) and the new City of San Antonio (COSA) grant (\$4K) remain open. MHM arrived November 1; VBLF is due in 2019. COSA payments should begin in January.
    - *Cash:* Cash balances on 10/31/2018 trailed Management's cash flow projections. The timing of grant payments was anticipated in October but arrived in November or are still pending. No gala sponsorships were received in the month. Management continues to monitor cash balances closely, and based on current projections, management does not anticipate the need to exercise the operating line-of credit (\$300K at Plains Capital Bank) during the next 12-months.
- *Facilities*
  - **Loans for 215 W. Olmos:** CBCST received term sheets from 4 respondents to the RFP for loan services to purchase the property at 215 W. Olmos Dr. The following banks responded to the RFP: Broadway, Frost, Jefferson, and Plains Capital. Philanthropist Gordon Hartman also presented an offer. After considering the respective offers, the Finance Committee recommended the acceptance of the offers from Hartman and Frost Bank. Summary information about the EC's action is included in this packet under "Motion to Ratify Action of Exec. Comm."
- *2019 Operating Budget*
  - Included in this packet is a ***Motion to Approve 2019 Operating Budget in amount of \$2,795,279.***

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## Program Highlights (Tami Logsdon)



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### Program (Tami Logsdon)

#### School-Based Grief Support Groups

In response to receiving the City of San Antonio (COSA) Grant, Leslie Wood and Tami Logsdon have been working to identify schools to pilot a 10-week school-based grief support program. Leslie is working with Kingsborough Middle School in Harlandale ISD ; and Tami is collaborating with Communities In Schools at Frank Madla Elementary School in South San ISD. We have held meetings with school principals, counselors and Communities In Schools staff and tentatively have a parent meeting scheduled for December 6<sup>th</sup> at Frank Madla and expect both groups to start at the school in January 2019. These pilot groups are the foundation for a proposed expansion of school-based programming in 2019.

Leslie is also communicating with leadership at Lanier High School (SAISD) regarding resuming groups at that site. Meanwhile, counselor Bianca Goodrum, started a group at Martin Luther King Academy (SAISD) in November for students in grades 2-5. The group will meet a total of three times in December, take the Winter break, then continue in January 2019.

#### Animal-Assisted Therapy Teams

Six new dog/handler therapy teams trained in early November at the Center under the tutelage of Steven Fontenot and Bellin. Three of the pairs are heading to Floresville to support clients at Paloma Place and three will join the teams at the Center in San Antonio.

#### Grief Education Institute (GEI) Presentation

Staff counselor, Marcella Hayes, LPC, Certified Trauma Specialist, presented at the Center on November 9<sup>th</sup> to 35 professionals on ways to utilize Trauma-Focused Cognitive Behavioral Therapy with grieving children. The presentation was well received and consistent feedback from professionals in the community is that we have great presentations that are practical and engaging!

Thanksgiving Break Camp Heroes is underway as this report is being written. There are 17 very active little ones from ages 7 to 12 years having a wonderful, meaningful experience with heroes capes, face painting, drumming, memory making, healing circles and therapy dogs.

### Development and Marketing (Julia Anderson, Suzanne Benavides, Franchesca Velten)

#### **Grants**

- Submitted: Proposals to Louis & Mary Pat Stumberg Foundation, Circle Bar Foundation, Alamo Kiwanis Club; and Year 1 Report to Nancy Smith Hurd Foundation
- In coming weeks will submit proposals to: V. H. McNutt Memorial Foundation (for CBCST), Lowe Foundation (for CBCST), Dudley T. Dougherty Foundation (for CBCST), Scaife Family Foundation (for RGV), Ray & Kay Eckstein Charitable Trust (for RGV)

#### **Friends Board and Volunteers**

- The Friends Board is actively planning our 18<sup>th</sup> Annual Gala with exciting honorees Erika Prosper and Mayor Ron Nirenberg along with Honorary Chairs Suzy and Cappy Lawton. Shannon Turner will be our guest speaker. This year's gala will be held on February 28<sup>th</sup> at Mays Family Center. You should have received information about table sponsorship and underwriting opportunities in the mail – we need your support as goal is to have over

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500 people in attendance! Thus far, we've sold 5 of 50 tables. Contact Julia @janderson@cbcst.org or 210-735-4847 ext. 224 to reserve your table now!

- Do you know someone who would be willing to donate a fun trip to the Live Auction (typically valued \$5,000 - \$10,000+)? Do you have access to a puppy? If so, contact Julia (contact information above).
- The Friends Board hosted a Taste and Tour on November 13<sup>th</sup> with over 75 people in attendance!

### Marketing and Fundraising

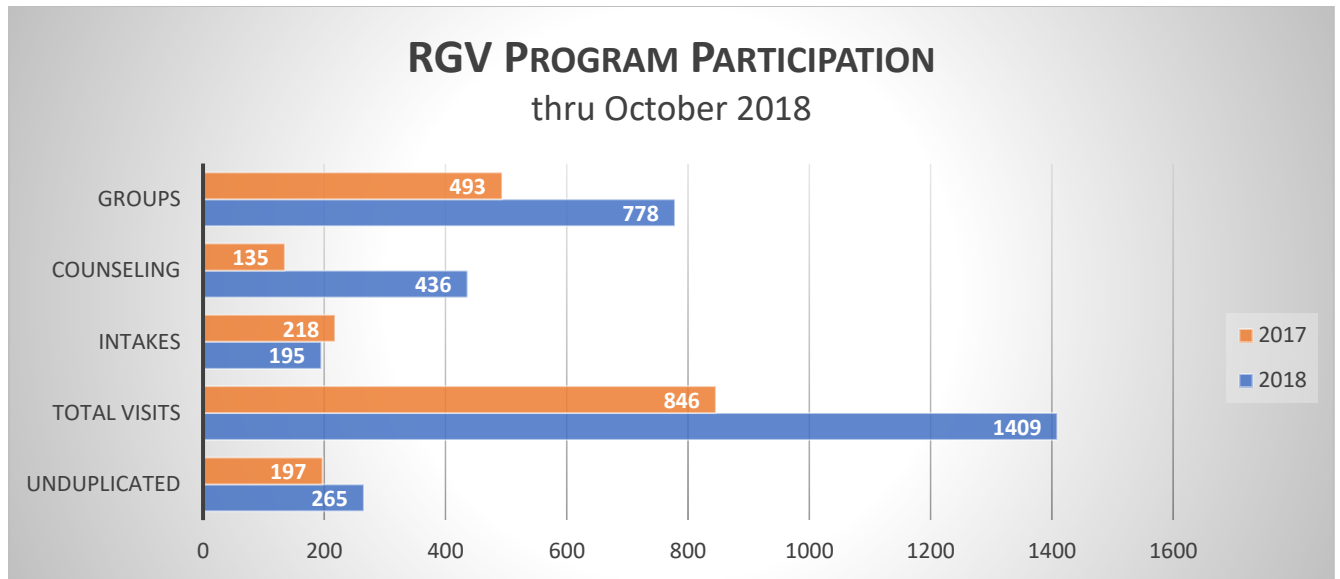
- Annual Campaign letters have gone out and people should have received them prior to Thanksgiving. Franchesca can supply a blank copy of the letter in an electronic version if you'd like, please contact her at [fvelten@cbcst.org](mailto:fvelten@cbcst.org) for more information. You'll also be seeing some other asks go out via eblast, please feel free to forward those on to your family and friends as well.
- Holiday Shop will be held Saturday morning, December 8<sup>th</sup>, where children "shop" for gifts for their surviving parents and caregivers; and decorate cookies and visit with Santa. Thank You to PlainsCapital Bank for sponsoring this event. If you'd like to volunteer your time and assist in helping children "shop" for their parent or decorate a cookie, contact Julia at [janderson@cbcst.org](mailto:janderson@cbcst.org).
- Coca-Cola Caravan: Thursday, December 13<sup>th</sup>, 3-5pm at the Rubles Center (419 E. Magnolia, SA, TX 78212) Coca-Cola has teamed up with Whataburger and the John T. Santikos Foundation, at the San Antonio Area Foundation, will be rolling up in a semi-truck bringing gifts and holiday cheer to the children of the Children's Bereavement Center. The Center has decided to share the holiday fun with the families of Alpha Home (who have also graciously allowed us to use their parking lot for the event), along with Thrive Well, and the families that are served through our Wonders & Worries partnership. If you'd like to volunteer for this event or would like more information, please contact Franchesca Velten at [fvelten@cbcst.org](mailto:fvelten@cbcst.org).
- The Grief Education Institute is gearing up for its 2019 Grief Education Symposium. Save the Date for Friday, February 1<sup>st</sup>, for a full day at the Whitley Center. The 2019 event will feature a presentation by Linda Goldman, "Creating Inclusion and Support for Children Experiencing Traumatic Loss and Grief". Breakout sessions will focus on several different types of therapy: play, art and pet. To RSVP your spot for the event or the lunch presentation of the HOPE Award, which is being presented to State Representative Diego Bernal, please contact Franchesca at [fvelten@cbcst.org](mailto:fvelten@cbcst.org).

### Outreach, Expansion and Special Projects (Marian Sokol, Blair Thompson, Bert Pfiester, Leslie Wood)

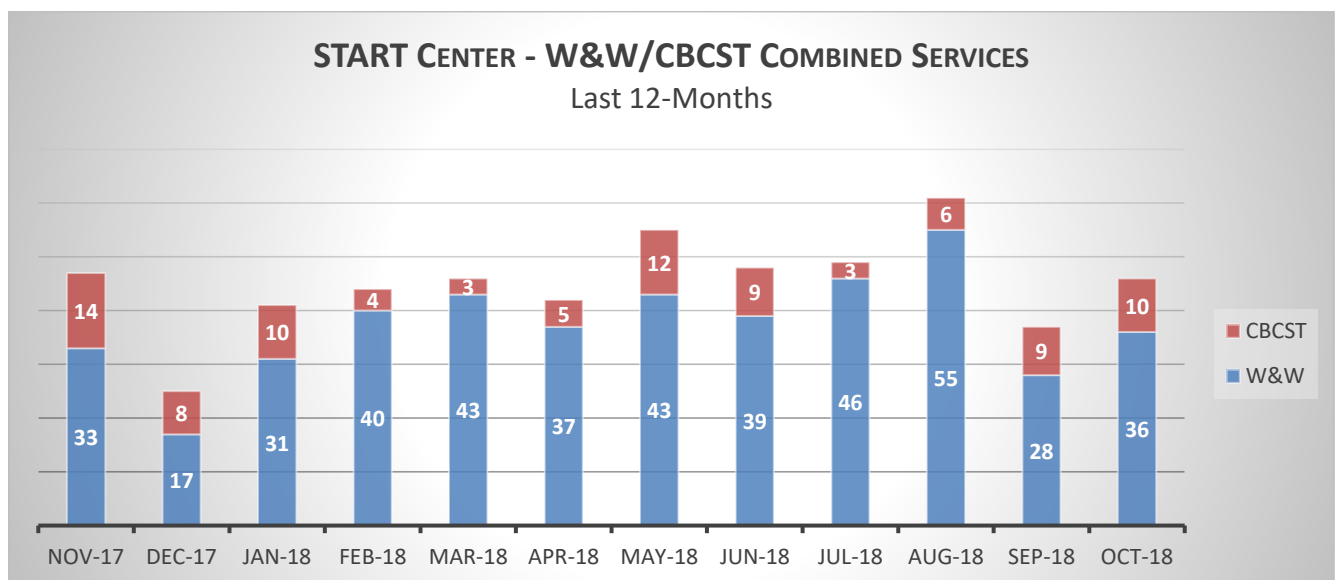
- Senior team immersed in outreach, from networking events such as galas and nonprofit luncheons, to staffing tables at runs and charitable events for schools and churches. Leslie is still responding post-death to schools, especially after traumatic death incidents. Leslie will also be featured on Texas Public Radio's *The Source* on November 27 related to coping with grief in the holiday season.
- In January a team from Nebraska's grief and loss center will visit CBC with architect. They are looking at the most acclaimed Centers in the country, ours included.
- **The Rio Grande Valley Center**-We are proud of the good work being accomplished and the good hearts of our team in Harlingen. The Advisory Board is planning a December Open House, and Regional Director Randy Baker is busy generating support for operations.

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- **Wonders & Worries-** The START Cancer Center was recently named a finalist for non-profit of the year, in large part recognizing the charitable sponsorship of Wonders & Worries and Thrivewell (Cancer Support for Women).
- Clients increases are slow but steady. Majority of families seeking service are in the recently diagnosed category, rather than end stage. We believe that some of this is due to the complicated logistics of bringing children for counseling and support when a loved one is medically fragile and/or near death. Most of the children have parents with a very serious diagnosis.



- **Paloma Place** -Center Director Ashley Jesse and team alreworking diligently and managing well. Referrals and counseling hours are on a steady upward trajectory. UTSA partnership and doctoral interns are all working well

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together. Ashley and additional full- time counselor are at about capacity for individual child counseling at this point; and we are adding another skilled LPC intern on a part time basis.

