



Shanti's Annual Report Fiscal Year 2013 – 2014

THANK YOU

Shanti appreciates our generous donors who make it possible for us to continue serving people with life-threatening illnesses. Without your support, many of Shanti's clients would remain underserved and in great need of practical and emotional support. **On behalf of our clients, thank you for partnering with Shanti as we enhance the quality of life, health and well-being of people living with life-threatening illnesses, including Breast Cancer and HIV/AIDS.**

CLIENT CASE STUDY

While the information shared below is helpful to describe our programs and the state of our organization, we start with the following client case study to underscore how our safety net services help clients when they need assistance most.

Ms. Chang, a 72-year-old born in China, was diagnosed with Stage-4 breast cancer, which had metastasized to her liver, lungs, and lymph nodes, requiring immediate intensive chemotherapy. She was referred to Shanti in October 2011 because her doctors were afraid that her limited English skills, the severity of her diagnosis, and her isolation meant she was at-risk for dropping out of treatment. Just two weeks after her diagnosis, a bilingual (English/Mandarin) Shanti Care Navigator met with Ms. Chang at her home and completed a needs assessment. Together, they developed a care plan as Ms. Chang began a rigorous course of treatment. Unfortunately, Ms. Chang experienced severe short-term memory loss, nausea, and fatigue due to treatment side effects.



Ms. Chang's battle with cancer led to bankruptcy, like many people facing life-threatening illnesses. To help offset the financial stress, Ms. Chang's Care Navigator referred her to the Breast Cancer Emergency Fund where she was able to access \$1,200 to put toward her mortgage payment. Shanti also helped Ms. Chang apply for Cancer Care, which funded her out-of-pocket breast cancer-related pain medication, and we referred her to Project Open Hand's home delivery meal program. In March 2013, we matched Ms. Chang with a Shanti volunteer. In October 2013, Ms. Chang's medical team at UCSF decided to stop the aggressive chemotherapy treatment, due to her declining mental and physical health, and suggested that she begin hospice care. Shanti staff and volunteers continued to act as a surrogate family, augmenting hospice care with home visits 2-3 times a week. Regrettably, Ms. Chang succumbed to cancer this past February. Shanti was with her until she passed.

EXECUTIVE SUMMARY

We are pleased to share this report with you as we celebrate our 40th year of service enhancing the quality of life, health, and well-being of people living with life-threatening illnesses. Thank you for your financial support. It enables us to provide critically needed services for people in great need. This report outlines our progress and achievements during our last fiscal year ending June 30, 2014.

In FY 2013-2014, Shanti provided services to over 2,050 individuals with HIV or cancer, with 1,745 from the San Francisco area and 322 from our national work presenting the L.I.F.E. Program workshops to People Living With HIV (PLWH). In FY 2013-2014, volunteers donated 8,574 hours of time as Volunteer Caregivers, valued at \$192,486. **This past fiscal year, we had 133 people serving as Volunteer Caregivers matched with clients; another 124 people served as volunteers in other capacities throughout the organization.**

With your support, Shanti provides clients help navigating the health care system, as well as health education related to their illness. Equally important, these clients seek emotional and practical assistance because they face their illnesses in isolation. The vast majority of our clients are very low-income, marginalized, and underserved, which makes Shanti's services part of their fragile safety net. Thanks in part to your support, all of Shanti's programs are provided free of charge to all individuals that seek our help. **Without our services, many of these clients would struggle to access treatment, fill out paperwork, schedule appointments, communicate with their doctor, access educational materials, get to medical appointments, or receive emotional support.** Shanti helps to ensure that our clients remain in treatment and emerge from isolation, improving their health outcomes. The following is a more detailed summary of our achievements in Fiscal Year 2013-2014.

SHANTI'S MARGOT MURPHY BREAST CANCER PROGRAM

"Without Shanti's Margot Murphy Breast Cancer Program, my experience of having breast cancer would have been more challenging to navigate through the medical system. The numerous services and resources Shanti has provided me during my treatment, as well as a fabulous navigator, have improved my quality of life. Thank you for all your support." –Yuri, a Margot Murphy Breast Cancer Program client



Our Margot Murphy Breast Cancer Program provided direct services to 403 clients in FY 2013-2014. We have not turned away a single person—which is significant because 79% of program clients live at or below 200% of the federal poverty level—and we have continued to meet our objectives with positive responses from our clients.

Our program augments hospital-based care and reduces the barriers that uninsured and underinsured women face accessing, maintaining and completing treatment. We provide an array of vital support services without which many women would not complete treatment. We engage our clients in Care Navigation support that includes the

following components: culturally and linguistically competent individualized case management, care advocacy, translation services, information about and assistance with applying for critical resources (emergency funds for rent/utilities and food), transportation to medical appointments, and appointment accompaniment. In FY 2013-2014, staff and volunteers provided over 6,400 hours of direct care to clients, distributed 1,120 taxi vouchers for medical and critical social services appointments, and distributed 183 emergency grocery vouchers. During treatment, when clients are engaged in Care Navigation, and throughout survivorship, we provide free Health, Wellness & Survivorship activities to help our clients manage the effects of their illness. Last year, these activities included 65 workshops comprising nutrition classes (in Cantonese, Spanish, and English) facilitated by professional nutritionists, art therapy workshops, mind-body healing classes, and weekly massage, reiki, and yoga. These workshops and activities are designed to encourage healthy lifestyles, advance self-advocacy, and offer clients the opportunity to emerge from isolation and enjoy community. 48 trained Volunteer Caregivers

were matched with Breast Cancer Program clients. Volunteers provided an average of three hours a week of support to their matched client.

We were honored that Michael Murphy made a multi-year grant to the program in memory of his wife, Margot Murphy. To commemorate this, the program was officially renamed Shanti's Margot Murphy Breast Cancer Program in November 2013. We are also proud to report that we have expanded the program to include women with gynecological cancers. In April 2014, the program co-authored a research paper published in the Journal of Cancer Education. The paper presents results from our 18-month research pilot in collaboration with the University of California, San Francisco (UCSF). The program was also awarded a prestigious 3-year California Breast Cancer Research Program grant and the Faith Fancher Disparities Award to continue our collaborative research with UCSF titled "Engaging Underserved Women in Health Research."

HIV SERVICES PROGRAM

"This program works for me because we talk about everything, they teach us about medicine, help us to fill out paperwork—they're here for your wellness. Thanks to Shanti I plan to live a long life even with HIV." –Margarita, an HIV Services Program client

Shanti's HIV Services Program provided direct services to 599 people living with HIV (PLWH) in FY 2013-2014, including 107 new clients.

Our HIV Services Program staff members and volunteers provided over 13,000 hours of direct care to help clients establish and maintain a continuity of care and treatment. The program creates a vital link between care providers and some of San Francisco's most disenfranchised and at-risk populations. For example, clients from this program experience high rates of homelessness or are marginally housed. Many clients have multiple diagnoses related to mental health, substance use issues, or hepatitis C virus (HCV), and a high number of clients are homebound due to physical limitations. Clients come from many at-risk communities such as PLWH (People Living With HIV) who are 50 years or older, communities of color, and women (including transgender individuals). Our programs have a "prevention with positives" focus, which encourages treatment adherence to reduce clients' viral load; this improves clients' health and greatly reduces the risk of transmission of HIV to others.



Through activities at partner sites St. Mary's Medical Center and Westside Community Services, and our onsite Drop-in Center, staff members connect with PLWH who are likely to engage in activities that lead to poor health outcomes and the transmission of HIV. The program's direct services include home visits to assess client health, advocacy with providers, and treatment adherence support. 85 trained Volunteer Caregivers were matched with HIV Services Program clients during the last fiscal year.

Our Drop-in Center is open four days per week, with Fridays reserved for women only. Clients come in for many reasons: to talk with Care Navigators, Health Counselors, or Client Advocates; access resource materials, vouchers, or bus tokens; use a computer or phone; or enjoy the community of their peers in the activities presented throughout the week. These activities include treatment-centered educational workshops at least once per month, a weekly movie night, and support groups. Weekly groups include Positive Women, HealthChat (supporting "severe need" clients often experiencing challenges with homelessness, substance use addiction, and/or mental health issues), and Vent (supporting African-Americans). Our Activities

desk is also within the Drop-in Center and provides a variety of free tickets to events occurring throughout the Bay Area that our clients would otherwise be unable to afford.

Most recently, based on Shanti's long-standing history of providing psychosocial support to PLWH, the San Francisco Department of Public Health (SFPDH) approached the Shanti Project to design, implement, and evaluate a pilot project to provide psychosocial support services in a group setting to the HIV+ Aging community. This pilot was initiated in response to a 2013 report by the San Francisco HIV Services Planning Council on the topic of "HIV and Aging," which found that HIV-positive aging adults (over the age of 50) were facing great challenges around isolation, depression, and histories of trauma and grief. Shanti collaborated with Let's Kick ASS (AIDS Survivor Syndrome) to ensure the broadest impact possible in terms of reaching PLWH over the age of 50. Let's Kick ASS is a new grassroots organization, founded by and comprising long-term survivors to address the unique psychosocial needs of people who lived through the first two waves of the HIV/AIDS epidemic in the 1980s and 1990s.

Through this collaborative pilot project, Shanti and Let's Kick ASS have engaged over 200 long-term survivors through a combination of monthly large gatherings, smaller weekly and bi-weekly groups, and multi-day group retreats, designed and facilitated by long-term survivors. Results of the pilot were presented to the SFPDH in Spring 2014.

L.I.F.E. PROGRAM[®] (LEARNING IMMUNE FUNCTION ENHANCEMENT)

"I'm very surprised about how much my peers can tell me about different aspects of HIV care. If I hear someone needs some information and I know something, I share. You can only learn so much from the computer: word of mouth and face-to-face contact cannot be underestimated." –Robert, a L.I.F.E. Program client

In FY 2013-2014, the L.I.F.E. Program served 1,215 PLWH, with 693 from the San Francisco area and 322 in other U.S. cities where we present the L.I.F.E. workshop. The L.I.F.E. Program is an effective HIV self-management program based on the latest research in HIV treatment, prevention, health promotion, and self-management. The program significantly improves health outcomes for PLWH by providing knowledge, motivation, skills, and support necessary to maintain health-supportive routines.

National LIFE Sites



In San Francisco, Shanti offers the L.I.F.E. Program in a variety of formats including individual health counseling, structured groups, and workshops. Last year, we conducted two workshops in English and two in Spanish, each comprising 3-hour sessions over 12-16 weeks. We offered one peer facilitator training for 15 new peer facilitators who are now trained to run workshops for PLWH, and we also offered weekly support sessions, which include L.I.F.E. Experience, L.I.F.E. Seminars (one-day intensive explorations of a single cofactor), and an HIV/HCV Co-Infection Support Group. These support sessions provided extended self-management tools to our clients who chose to attend, and focus on unique issues faced by our clients. Additionally, we provided Yoga for HIV+ Health.

The L.I.F.E. Program supports underserved and diverse populations with a culturally and linguistically relevant program designed to best meet the needs of its clients. In FY 2013-2014, the program was replicated and implemented in community-based organizations, hospitals, and medical clinics in 17 national sites in Missouri, Massachusetts, Louisiana, Florida, and South Carolina, serving 322 participants outside of San Francisco. Shanti provides each site with curriculum development, facilitator training, technical assistance, and outcomes evaluation. Since 2004, almost 4,700 individuals nationally have completed the 12-16 week L.I.F.E. workshop for PLWH.

VOLUNTEER SERVICES PROGRAM

"My experience as a Shanti volunteer taught me how to help others based on their needs rather than my own definition of what it means to be a caregiver." –Debbie, a Volunteer for an HIV Services Program client

In FY 2013-2014, volunteers donated 8,574 hours of time as Volunteer Caregivers, valued at \$192,486. **This past fiscal year, we had 133 people serving as Volunteer Caregivers matched with clients; another 124 people served as volunteers in other capacities throughout the organization.** Our trained Volunteer Caregivers assist clients by providing services that promote health and well-being. They provide non-judgmental practical and emotional support, helping to eliminate barriers to care that include social isolation and a lack of compassionate care, immobility, homelessness, mental health issues, chemical dependencies, limited English skills, and lack of adequate medical insurance. Last year, we hosted three Volunteer Trainings, attended by 64 new volunteers, staff, board members, and community participants. Forty Volunteer Caregivers trained in FY13-14 have been matched one-on-one with clients; to date we have trained over 18,000 people to provide support to our clients. The Volunteer Training, which takes place over four days, is comprehensive and multi-faceted, with great emphasis placed on experiential learning through the use of interactive activities, presentations, and discussions; as a result our volunteers are trained to provide high levels of psychosocial support. Topics covered in the training include the Shanti Model of Peer Support™ and non-judgmental listening; peer counseling tools and techniques; psychosocial and clinical issues; issues of diversity and cultural competency; self-care and boundaries; and loss and grief.



The Volunteer Services Program also supports the many beneficiary events in which Shanti participates to help fund our client programs, including the AIDS Walk, Folsom Street Events, and Academy of Friends.



CANCER SUPPORT GROUP

In FY 2013-2014, Shanti's Cancer Support Group, "Jeffrey's Place," served 50 gay/bisexual men with a cancer diagnosis. Cancer is a co-morbidity that occurs increasingly among aging PLWH, though one does not need be HIV-positive to participate in the group. Half of the men served have dual diagnoses with HIV and cancer. Each client who had a dual diagnosis had a minimum of three different types of cancer. A total of nine members have passed away because of cancer in the five years the group has been in existence. Jeffrey's Place is the only resource of its kind in the Bay Area, attracting participants from as far as Santa Rosa and Gilroy. Kaiser Permanente, California Pacific

Medical Center, UC San Francisco, San Francisco General Hospital, and the Pacific Center all refer patients. Jeffrey's Place meets the 1st and 3rd Thursday each month with yoga on Tuesdays. This year the group continues its World Cancer Day annual event (began in 2010), promoting a three-part workshop series, over six weeks, around being newly diagnosed, nutrition during and after treatment, and other issues.

COMMUNITY SUPPORT PROGRAM

This program provides management, evaluation, policy analysis, needs assessment, administrative support, and training to council members of the San Francisco Eligible Metropolitan Area (SFEMA) HIV Health Services Planning Council. This group is mandated by Congress and The Health Resources and Services Administration to determine the prioritization of HIV service categories and the allocation of Ryan White resources to the SFEMA (including San Mateo, Marin and San Francisco). In FY 2013-2014, HIV Health Services Planning Council staff members, who support the Council, conducted a targeted needs assessment for PLWH: Men who have sex with men who use or who have used crystal meth. This target population is identified as "Severe Need" and was noted in the Planning Council's 2012-2014 Three-Year Comprehensive Plan as having high rates of HIV infection. The needs assessment found that top priorities for this group included increasing mental health services, housing, psychosocial services, and addressing the disproportionate impact of crystal meth on African Americans. This needs assessment surveyed more than 50 participants each within multiple focus groups.

PRIMARY FUNDING SOURCES

During FY 2013-2014, Shanti's programs were funded by: Love From Margot Foundation: \$150,000; Genentech Foundation: \$100,000; Nordstrom: \$60,000; Avon Foundation: \$50,000; San Francisco Bay Area Affiliate of Susan G. Komen: \$50,000; Kaiser Permanente San Francisco Community Benefit Program: \$40,000; Gilead: \$40,000; Dignity Health: \$25,000; To Celebrate Life Breast Cancer Program: \$20,525; Safeway Foundation: \$20,000; Abbvie: \$20,000; Folsom Street Events: \$17,000; Academy of Friends: \$16,238; Cisco: \$15,000; Macy's: \$12,500; and George H. Sandy Foundation: \$10,000. Our government funding is distributed by the City and County of San Francisco (subcontracted through the San Francisco AIDS Foundation and San Francisco General Hospital) and the San Francisco Department of Public Health (Ryan White Part A funding). Together these contracts provided a total of \$1,267,017. Our fees for service through the National L.I.F.E. Program contracts totaled \$55,000.

ORGANIZATIONAL SYNOPSIS

FY 2013-2014 was the successful realization of our five-year development plan in terms of diversifying our revenue sources. Significantly, Shanti's fundraising efforts experienced large increases across the board. Our percentage of revenue from grants was 25%, and donations from corporations, individuals, and events was 30%, bringing our percentage of non-governmental support to 55%. Two of our events made significant contributions to supporting our programs. *Compassion is Universal*, our 39th Annual Event, was a tremendous success, as was our spring fundraiser to benefit Shanti's Margot Murphy Breast Cancer Program. Combined, both events raised more than \$357,000. We expect to maintain our momentum with successful events this year. In 2014, we also produced our 3rd "Swim for L.I.F.E" event, held on August 24th, to benefit our L.I.F.E. Program, further building its funding base.

THANK YOU FOR YOUR SUPPORT!