



ANNUAL REPORT

July 2020 - June 2021

July 2021 - June 2022

Together, We Are *Felton.*

letter FROM THE PRESIDENT & CEO



Al Gilbert is President and CEO of Felton Institute, the San Francisco Bay Area's largest outpatient mental health provider, serving more than 60,000 clients annually, across five counties; San Francisco, Alameda, San Mateo, Monterey, and Marin.

“

As I reflect on 2021 and 2022, I am both humbled and inspired as our organization continues to find ways to meet the unique challenges of these last few years. We responded by creating positive and enduring change in the community, providing critical programs that provided a lifeline to individuals, families, and communities - from serving children's educational endeavors, to providing tech support to isolated older adults, to serving the justice impacted. We created successful outcomes, continuing to lead with compassion, innovation, partnership, and respect for the communities served. Our tremendous growth this past year is a testament to our expanded success in meeting the needs of Bay Area communities.

For 133 years, Felton Institute has created impactful change by fostering a strengthened community that begins with us. I'm inspired by our diverse workforce who provide their expertise and respond with empathy to all they serve. I am honored that people have chosen to spend their professional careers working at our historic organization. In the following pages you will read about our many endeavors and successes. You will see that we serve with intention and compassion and strive to empower all who engage with us.

We Are Felton Institute...Felton Strong.

Al Gilbert,
Felton Institute President & Chief Executive Officer

letter FROM FELTON'S BOARD CHAIR



Darren Skolnick is the Chair of Felton's Board of Directors and serves as a member of the Finance Committee. He has served on the Board since 2017 and brings over 30 years of progressive and diversified business experience. He is currently the Director of Compliance and Privacy at Hinge Health in San Francisco, CA, the world's first digital clinic for musculoskeletal care.

“

I'm continually inspired by Felton Institute's legacy of resilience and innovation. Responding to local and national crises with efficiency and compassion, the 133-year-old institution has flourished during times of adversity. From taking the lead in the 1906 San Francisco Earthquake Relief Program to providing critical services during the COVID-19 Pandemic, I'm proud of Felton's continued commitment to serving the needs of the community and empowering individuals and families.

It's truly an honor to work with dedicated leadership and staff as we continue to provide services during these uncertain and challenging times. As Board Chair, I'm dedicated to ensuring the values and mission of Felton Institute as we continue to provide critical programs and service-linkage for the unhoused, older adults, and justice-involved individuals, among other critical services. Acting as a lighthouse in the thick of the storm, Felton Institute has continued its tradition of uplifting and supporting communities.

Reflecting on our past accomplishments, I look to the future with confidence and hope.

Darren Skolnick,
Felton Institute Board Chair

COMMUNITY STRENGTHENING THROUGH INNOVATIVE *care*

Since its founding in 1889, Felton Institute has expanded its programs while providing cutting-edge services to address the needs of the community.

The history of this 133-year-old institution is one of progress and innovation. In the present day, Felton boasts over fifty programs serving those impacted by the justice system, individuals struggling with mental health, preparing children for educational success, providing older adults with critical resources, and more. In addition to program expansion, Felton has grown to a workforce of nearly 500 employees as well as extending its geographic reach to five Bay Area counties that include Alameda, Marin, Monterey, San Francisco, and San Mateo.

Founded in 1889 as the first nonsectarian relief organization in the city of San Francisco,

Felton's historical timeline is one that encompasses innovation and community resilience. Its services are interwoven into the fabric of San Francisco's history; in 1906, Felton directed the entire San Francisco Earthquake Relief Program, provided services for orphans, and introduced the first employment agency in the United States, as well as other notable accomplishments.

Since that time, Felton has created award-winning mental health services, early care and education programs, support for teen parents, service linkage for the unhoused, and reentry resources, among other vital services.



PHOTO: Felton Institute is a leader in providing groundbreaking services to families & communities.

To honor these accomplishments, San Francisco Mayor London Breed declared October 30th Felton Institute Day in 2019.

Mayor Breed said of the historic organization, "Felton is an important partner in making us deliver what is necessary to make San Francisco a better, more equitable place for our residents." That sentiment especially rang true when the worldwide COVID-19 pandemic hit in 2020, bringing hardship, fear, and uncertainty to the nation.



PHOTO: Older adults benefit from Felton's services that provide support, service linkage, and vital resources.



PHOTO: Felton Institute empowers all they serve..

Honoring Felton's long history of successfully responding to local and national crises, the organization reacted swiftly and efficiently to the pandemic.

We accomplished this by adapting to shelter-in-place protocols that transformed needed services into virtual models and provided critical programs to the community. As the nation moves out of the darkest days of the pandemic, Felton Institute continues to provide services with compassion and care, leading the way in providing vital support and empowering communities, whether operating as Associated Charities, Family Service Agency of San Francisco, or as now Felton Institute.

THE *legacy* OF FELTON INSTITUTE

1889

Felton Institute, originally named Associated Charities, is founded as the first nonsectarian relief organization in San Francisco.

1901

Dr. Katharine "Kitty" Felton is named the Executive Director of Associated Charities, a notable accomplishment for a woman of the time.

1906

Associated Charities directs the entire San Francisco Earthquake Relief Program, shifting the mission from advocacy to direct service.

1907

Leading the way, Associated Charities creates the first-ever employment agency in the United States, develops mental health counseling and foster care, and combines public and private funds to allow single mothers to remain at home.

1909

Associated Charities inaugurates the "San Francisco Model of Care," combining public and private funds to provide cost-effective social services, changing how social services are provided nationwide.

1971

The opening of Felton's first Early Care & Education (ECE) program, Family Developmental Center (FDC), providing comprehensive childcare services for families in San Francisco's Mission District.

1965

Felton launches the Foster Grandparent Program, providing low-income senior volunteers with training and stipends to give support and attention to children with special needs at sites throughout San Francisco.

1943

The Mother's Aide Program – a forerunner to TAPP, Felton Institute's current program for teenage parents – is developed and run through the Public Welfare Department.

1910

The agency advocates for improved standards and practices for child labor, school attendance, industrial accident insurance, mental health care, adoption, care of disabled people, minimum wages for women and minors, and health services in public schools.

1977

The Developmental Disabilities Case Management Program for children begins. Felton initiates a Primary Therapeutic Program, providing physical, occupational, and speech therapies.

1981

Felton develops TAPP (Teenaged Pregnancy and Parenting Program), a case management program for teenage parents, allowing mothers to continue their high school education. California later bases its statewide model for addressing teen pregnancy prevention upon Felton's model.

1984

The Senior Companion Program launches, bringing together mobile seniors and their homebound peers.

1991

Ryan White Mental Health Services for HIV-positive Persons begins. Also, FIRST (Family Intervention and Recovery Services Team) Program for substance-abusing parents begins.

2008

PREP, a program of prevention and early intervention for youth on the brink of psychosis, is offered to the community through a partnership with UCSF. The new therapies provide, for the first time, the possibility of remission of mental illness when caught at an early stage.

2007

With public and private support, Felton initiates a new array of innovative, intensive treatment programs; Senior Peer Recovery Center, Moving Ahead Program, Senior Full-Service Wellness Program, Back on Track Program for Transitional Aged Youth, and Young Family Resource Center.

2005

CIRCE, an electronic mental health charting system, is developed, saving charting time, leading to billing efficiency, and providing critical outcome and improvement data while allowing Felton clinicians to spend more time with clients.



2011

Felton forms CIRCE Software, Inc in close collaboration with Salesforce and the Salesforce Foundation to bring affordable, adaptable information management solutions to the business and nonprofit worlds.

2012

PREP is awarded a Center for Medicaid and Medicare 3-year grant expanding PREP to San Joaquin and Monterey Counties.

2013

Felton receives a \$1.5 million research award from PCORI (Patient-Centered Outcomes Research Institute), a nationally recognized institute from Washington, DC.

2014

PREP receives the National Behavioral Council's Science to Service Award. Due to expanded services in multiple Northern CA counties and to honor its visionary founding director, our agency (previously known as Family Service Agency of San Francisco) becomes known as Felton Institute.

2019

On the 130th anniversary of Felton's founding, San Francisco Mayor London Breed declared October 30th Felton Institute Day. Mayor Breed said of Felton, "Felton is an important partner in making us deliver what is necessary to make San Francisco a better, more equitable place for our residents."

San Francisco Suicide Prevention (SFSP) merges into Felton Institute to broaden the range of mental health and social services offered across the city and to strengthen suicide prevention within Felton's established programs.

The Justice Division, Felton's fastest-growing division, is introduced to accommodate the strategic focus on innovation and expanded care. The division collaborates with various local agencies and officials to provide rapid response, community engagement, service linkage, and relationship-building assistance for justice-involved people. Focus is on individuals and communities who are unhoused or insecurely housed, formerly incarcerated, have substance abuse and/or unaddressed mental health disorders.

2018

The Older Adult Service Team (OAST) opens its newest location in San Leandro to provide comprehensive clinical case management and psychiatric services for older adults in Alameda County.

Felton adds to its in-house early care and education-inclusive childcare services operations by assuming responsibility for four Early Childhood Education (ECE) sites in San Francisco that now offer trauma-informed, medical, social and educational needs of the child and family.

2020

When the COVID-19 pandemic began, Felton transformed needed services into virtual models, with staff working safely from home, rapidly training and adapting to new technology tools, and continuing to provide essential services to clients. Pivots included Early Childhood remote learning at five of Felton's Early Childhood Education Centers. San Francisco Suicide Prevention adopted a new cloud-based phone system allowing volunteers to answer crisis calls safely from home, among other services.

2023

stay **TUNED!**

2022

Felton launches SAMHSA's National 988 Suicide and Crisis Lifeline in the City and County of San Francisco. Felton, in partnership with CIRCE's innovative software development team, created CA's first 988 call management, data tracking, and staff and volunteer scheduling system.

2021

Felton formalized its tradition of assisting other behavioral health nonprofits in serving the community through administrative support in human resources, fiscal, IT, management consulting, and operational stewardship via fiscal sponsorship, with the implementation of a Technical Assistance Division.



executive LEADERSHIP

— Alphabetical By Last Name, After The CEO —



Al Gilbert

President and Chief Executive Officer
(CEO)



Liz Damacio-Julien

Chief People Officer
(CPO)



Marvin Davis

Chief Financial and Operations Officer
(CFOO)



Kenji Paschen

Chief Technology Officer
(CTO)



Yohana I. Quiroz, Ed.D.

Chief Operations Officer
(COO)

senior LEADERSHIP



Sarah Richardson Baker

Director, Communications and
Community Engagement



Adriana Furuzawa

Division Director,
Early Psychosis Services



Robin S. Ortiz, Ph.D.

Director, Business Development



Curtis Penn

Division Director, Justice Services



Cathy Spensley

Division Director, Senior Services

Felton institute

INNOVATION IN SOCIAL SERVICES

OUR *vision*

Drive positive and sustainable community led change where all have equitable access to innovative, high-quality, evidence-informed services.

OUR *mission*

Rooted in equity, Felton Institute transforms quality of life and promotes social justice to accelerate community led change.

PHOTO (right): Felton Institute is a leader in providing cutting-edge services that transform people's lives. As we grow, we have expanded our reach across the Bay Area. In 2019, Alameda, California became our East Bay headquarters. The location houses Felton's Leadership Team and Administrative Departments along with the offices of several mental health and social service programs.



OUR SITE *locations*

July 1, 2020 – June 30 2022



PROGRAM SITES & OFFICES

Operations and programs are spread over five counties: Alameda, Marin, Monterey, San Francisco, and San Mateo, responding to the belief that those in crisis must have access to social services.

WIDE ARRAY OF SOCIAL SERVICES

Our services are comprehensive with an emphasis on the needs of low-income families, children, the elderly, ethnic minorities, justice impacted individuals, and people living with mental and physical disabilities.

WHO WE *serve*

58

Mental health & social services programs

13

Staff total languages spoken.

English, Spanish, Portuguese, Cantonese, ASL, Mandarin, Arabic, Japanese, Tagalog, Vietnamese, Russian, French, Bengali

6

Program divisions providing cutting-edge social services

July 1, 2021 - June 30, 2022

63,515

CLIENTS SERVED

3,042

Total Unhoused During Services

42% LGBTQIA+

74% Racial and Ethnic Minorities

42% Female clients

16% Unhoused clients at time of referral

86% Clients below the poverty line

July 1, 2020 - June 30, 2021

53,086

CLIENTS SERVED

1,567

Number of Referrals

9% LGBTQIA+

74% Racial and Ethnic Minorities

44% Female clients

11% Unhoused clients at time of referral

92% Clients below the poverty line

OUR PROGRAM DATA

Fostering compassion and dignity, Felton Institute's programs reach across all racial, ethnic, cultural, social, and linguistic lines. We respond to the needs of families and individuals with cultural sensitivity and care. As Felton Institute grows, we've seen an increase in the populations we serve. In the past two years, the number of clients served grew by almost 20%. Since our 2019/2020 report, ethnic and racial minorities increased by 25% and clients at or below the poverty line increased by 7%.

OUR *target populations*



EARLY CARE & EDUCATION



AGING SERVICES



MENTAL HEALTH



TRAINING, RESEARCH & EVALUATION



FAMILY SUPPORT



JUSTICE SERVICES



1

CHILDREN, YOUTH, AND FAMILY

2

TRANSITIONAL AGE YOUTH

3

ADULTS

4

SENIORS

OUR LIFE TRANSFORMING *programs*

**Programs active between July 1, 2020 – June 30 2022*

Children, Youth, Family & TAY

Building Back Stronger Families and Communities

Services include early care and education, early intervention, and inclusion for children birth to six years old. We offer mental health services for youth and wrap-around family support, workforce development and social services to all enrolled families.

Early Care and Education Programs (ECE)

- Family Developmental Center (FDC)
Ages Birth – 6 Years
- Felton Learning Center (FLC)
Ages 2.9 – 6 Years
- Martin Luther King Center (MLK)
Ages 2.9 – 6 Years
- Sojourner Truth Center (STC)
Ages Birth – 3 Years
- Solmar Learning Center (SLC)
Ages Birth – 5 Years

BELOW: On August 5, 2022, preschoolers from Felton's ECE programs celebrated with the first in-person graduation since 2019.

Early Intervention & Inclusion Programs (EII)

- Felton Early Autism Program (FEAP)
Ages Birth – 3 Years
- Infant Development Program (GGRC)
Ages Birth – 3 years
- Infant Mental Health (IMH)
Ages Birth – 5 Years

Family Support Programs

- Healthy Families, Healthy Lives
"Familias Sanas, Vidas Sanas"
Wellness Program
- Teen Resources to Achieve Positive Practices (T-RAPP)
- Teenage Pregnancy and Parenting Program (TAPP)
- Young Family Resource Center (YFRC)
Under 24 Years
- Felton's Family Resources Centers (FFRC)

Mental Health Programs

- Full Circle Family Program (FCFP)

Workforce Development Programs

- Early Care and Education
Realizing Employment And
Creating Hope (ECE REACH)

Adult Services

Empowering Clients with Life-Changing Resources

Felton's Adult Services delivers an array of innovative and comprehensive programs. We provide clients with mental health support, resources, and crisis intervention, promoting psychological and physical well-being.

- Early Intervention and Eviction Assistance Program
- Local Outreach to Suicide Survivors (LOSS)

Adult Mental Health Programs

- Adult Full Service Partnership (FSP)
- Adult Intensive Case Management (ICM)
- Deaf Community Counseling Services (DCCS)
- Transitional Age Youth Acute Linkage (TAL)
- Transitional Age Youth Full Service Partnership (FSP)

San Francisco Suicide Prevention (SFSP)

- SFSP – Crisis Line
- SFSP – Lifeline 988
- SFSP – Drug Relapse Line
- SFSP – After Hours and Weekends DPH Behavioral Health Access Line and Central Coast Crisis Line
- SFSP – HIV/AIDS Nightline, Local and National and Text
- SFSP – Crisis Text and Chat, and Youth Crisis Text and Chat
- SFSP – Youth Risk Reduction Program, in partnership with SFUSD
- SFSP – Community Outreach and Education Program with San Francisco Community Partners
- SFSP – Peer Grief Support Group



ABOVE: San Francisco Suicide Prevention (SFSP) provides a lifeline to those experiencing mental health issues.

Justice Services

Forging a Pathway to Stability

By collaborating with various local agencies and officials, Felton provides rapid response, community-driven engagement, service linkage, and relationship-building assistance to under-served and underrepresented communities. Focus is given to those who are insecurely housed and justice impacted.

- Center of Reentry Excellence (CORE)
- Felton Engagement Specialist Team (FEST)
- Felton Street Case Management Team (FSCM)
- Mission to Motivate (M2M)
- Reentry Engagement Program (REP)
- Success: Movement from Incarceration (SMI)
- Supporting Treatment and Reducing Recidivism (STARR)
- Young Adult Court (YAC)



PHOTO: Felton Institute's Julie Schnieder, MSW who is a Field Service Coordinator for the San Francisco Long-Term Care Ombudsman Program, engages with one of the residents that the program has advocated for.

Senior Services

Championing the Needs of Older Adults

Specializing in mental health, workforce development, and community engagement, along with other aging services, Felton's Senior Division helps older adults flourish in their communities with dignity, security, and a high quality of life.

- Case Management for Alameda County (APS)
- Case Management for Older Adults and Adults with Disabilities (DAS)
- Community Liaisons
- Flexible Subsidy Housing Program
- San Francisco Long-Term Care Ombudsman Program (LTCO)
- Tech Squad

Felton's AmeriCorps Seniors Programs

- Senior Companion Program (SCP)
- Foster Grandparent Program (FGP)

Older Adult Mental Health Programs

- Intensive Case Management (ICM)
- Outpatient Mental Health Services (OMH)
- Older Adult Full Service Partnership (FSP)
- Older Adult Service Team (OAST)

Senior Community Service Employment Program (SCSEP)

- SCSEP – Back 2 Work (B2W)
- SCSEP – Downtown
- SCSEP – Marin
- SCSEP – San Mateo
- SCSEP – Visitation Valley

Visitation Valley Seniors

- Visitation Valley Senior Health & Wellness
- 66 Raymond Community Services

Early Psychosis Services

Intervening Early and Focusing on Recovery

Innovative, evidence-based programs to diagnose and treat early psychosis and bipolar disorder. We provide screening and treatment to adolescents and young adults so they can learn skills to manage symptoms, focus on recovery, and reach their full potential.

- (re)MIND® and BEAM Alameda
- (re)MIND® Marin
- (re)MIND® Monterey
- (re)MIND®, BEAM and BEAM UP® San Francisco
- (re)MIND®, BEAM, and (re)MIND® Alumni San Mateo

133 YEARS OF service

Training, Research and Evaluation Division (TRE)

Pioneering New Strategies for Social Work

Professional development and behavioral health training for providers are offered in a variety of Evidence-Based Practices (EBPs) to agencies in California and the nation.

- Behavioral Health Training Workshops

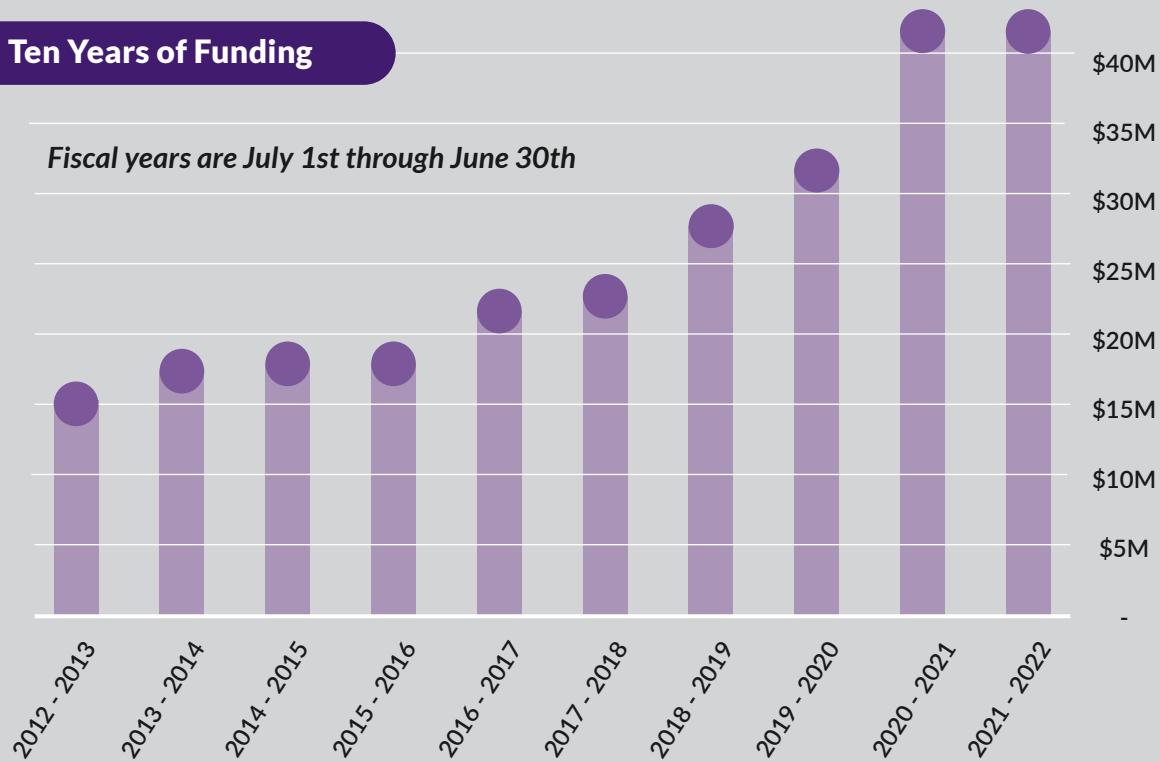


PHOTO: Our life changing services support and inspire all we serve.

making a MEASURABLE DIFFERENCE

Ten Years of Funding

Fiscal years are July 1st through June 30th

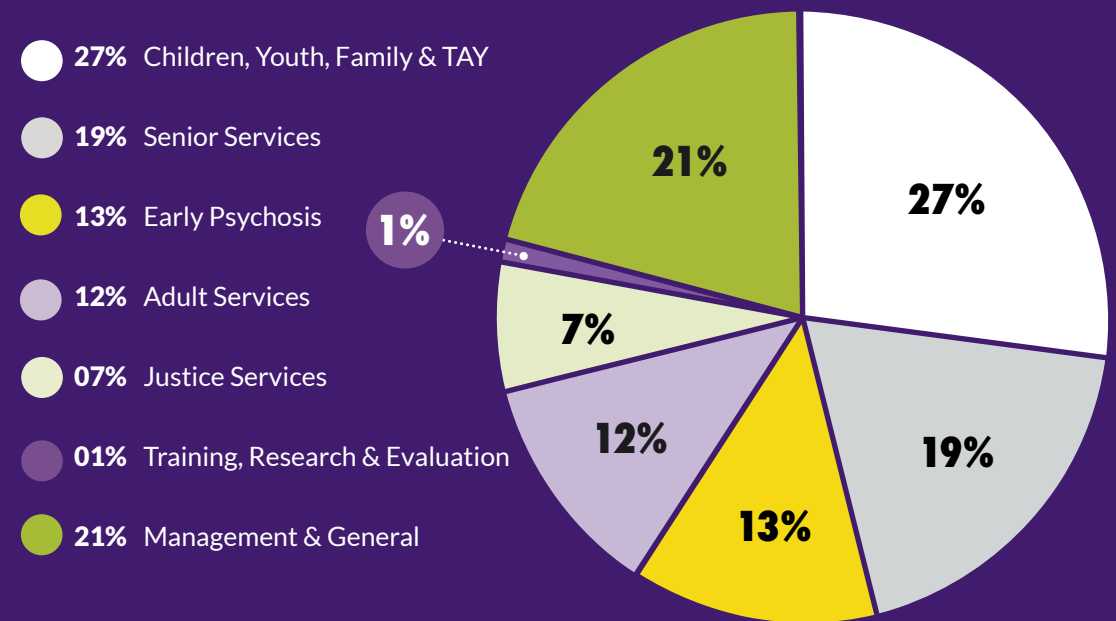


Statement of Activities

	2022	2021
Total Revenue & Support	\$41,536,149	\$40,978,416
Total Expenses	\$41,152,810	\$36,240,652
Change in Net Assets	\$383,339	\$4,737,764

financial statements FOR YEAR ENDING JUNE 2022

Functional Expenses (Spending)



Statement of Financial Position

	2022	2021
Total Assets	\$17,837,214	\$19,462,618
Total Liabilities	\$10,855,719	\$12,864,381
Total Net Assets	\$6,981,495	\$6,598,156
Total Liabilities & Net Assets	\$17,837,214	\$19,462,537

community ENGAGEMENT



CORE Spa Day:

In honor of International 'Self Care Day,' Felton's Center for Reentry Excellence (CORE) treated clients to a 'spa day.' CORE, which serves justice-involved individuals, provided free haircuts and make-overs.



Solmar Grand Opening:

Felton Institute celebrated the opening of its fifth early care and education (ECE) site, Solmar Learning Center (SLC) in San Francisco. SLC is Felton's first co-located ECE with affordable housing, addressing two major needs families have, access to affordable housing and childcare.



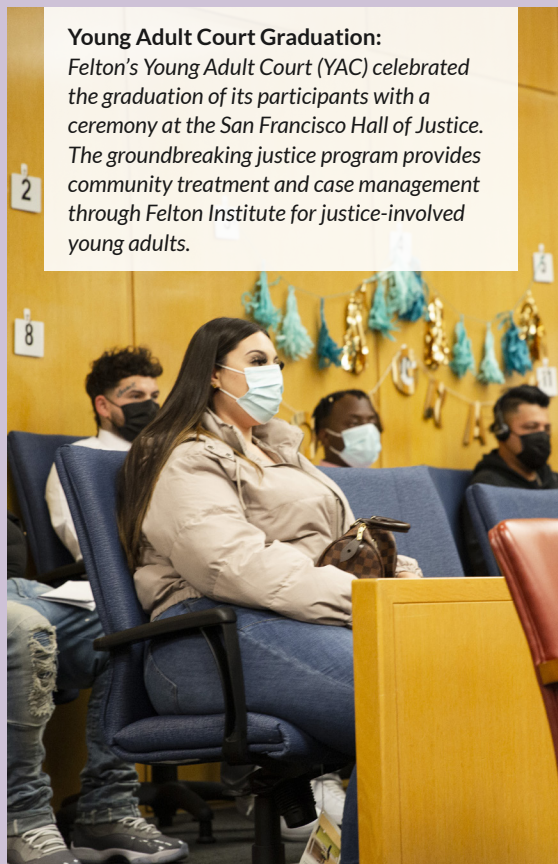
FCFP Open House:

Felton Institute celebrated the opening of its new Full Circle Family Program (FCFP) location in SOMA, San Francisco. The new location is FCFP's first child-centric mental health clinic, designed specifically to serve children under eighteen.



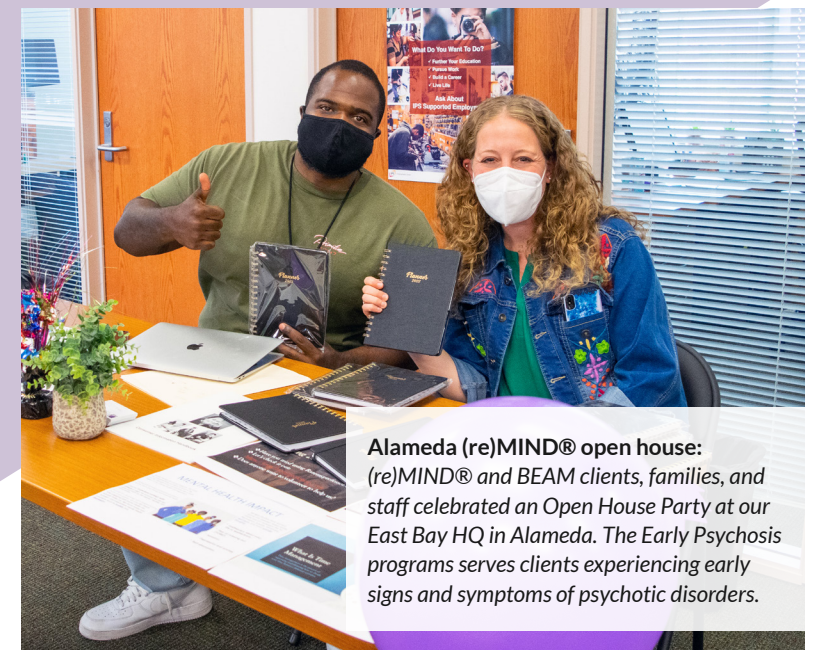
Justice Division Open House:

The Justice Division celebrated the opening of its newest location in SOMA, San Francisco. The new location expands Felton's capacity to continue to serve four Justice Division programs FEST, FSCM, STARR, and YAC, in a single location.



Young Adult Court Graduation:

Felton's Young Adult Court (YAC) celebrated the graduation of its participants with a ceremony at the San Francisco Hall of Justice. The groundbreaking justice program provides community treatment and case management through Felton Institute for justice-involved young adults.



Alameda (re)MIND® open house:

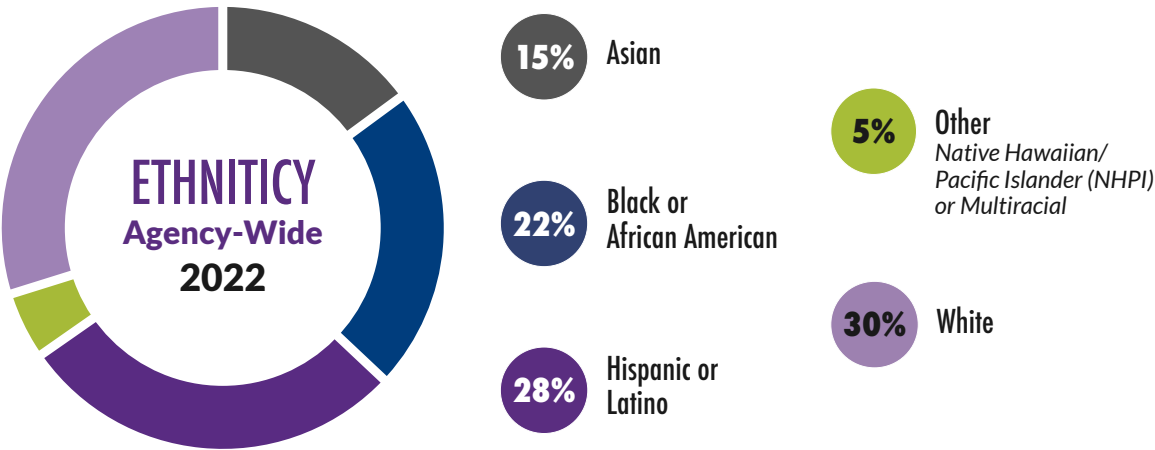
(re)MIND® and BEAM clients, families, and staff celebrated an Open House Party at our East Bay HQ in Alameda. The Early Psychosis programs serves clients experiencing early signs and symptoms of psychotic disorders.

FELTON AND OUR VALUE OF *diversity*

*Data compiled by the Felton Institute HR Department. June 30, 2021 and June 30, 2022.
Graphs are inclusive of all Felton Employees but do not include SCSEP, Contractors or Volunteers.

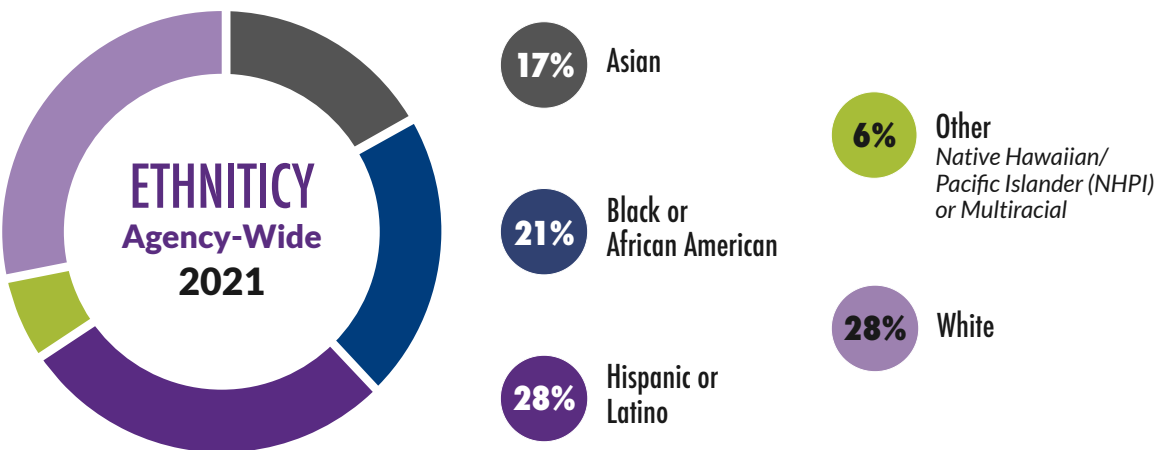
2022 Employee Representation Data

In 2022 Felton Institute's workforce consisted of **651** individuals including **389** Employees, **52** older adults in SCSEP, **60** Contractors & **150** Volunteers.



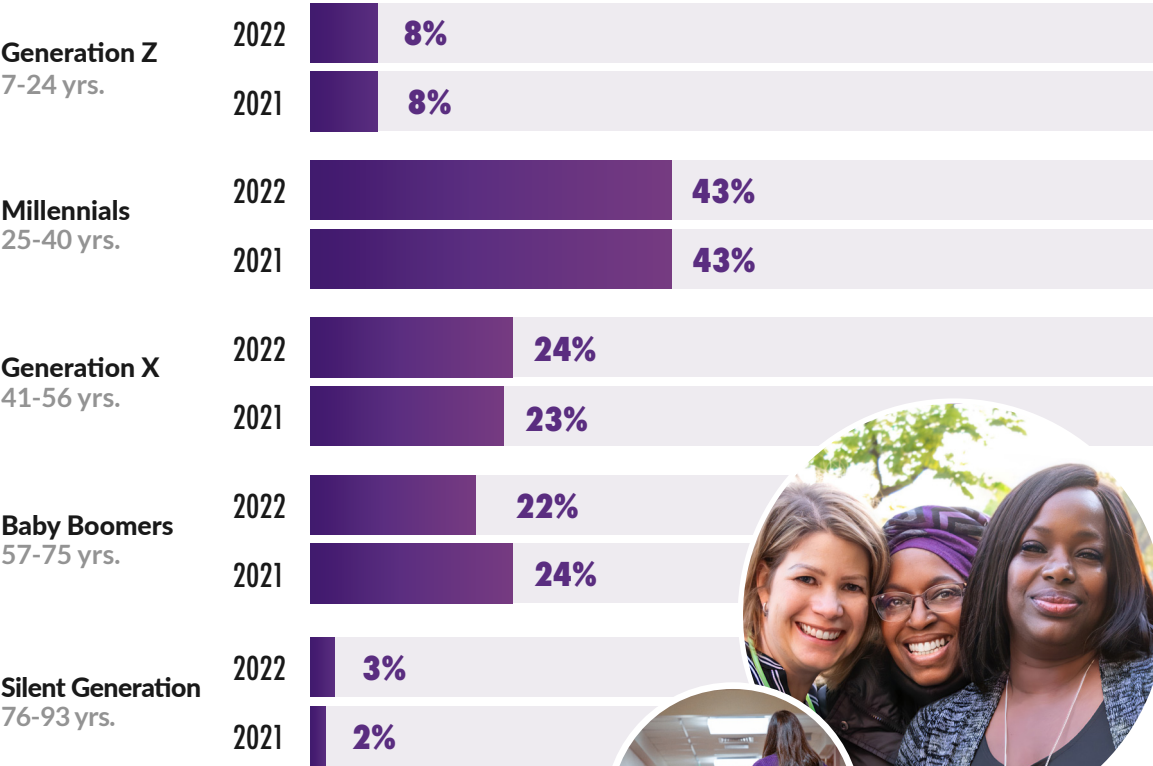
2021 Employee Representation Data

In 2021 Felton Institute's workforce consisted of **550** individuals including **356** Employees, **39** older adults in SCSEP, **55** Contractors & **100** Volunteers.



Felton's social services and programs combine cultural sensitivity, deep respect for client and staff, and a commitment to social justice.

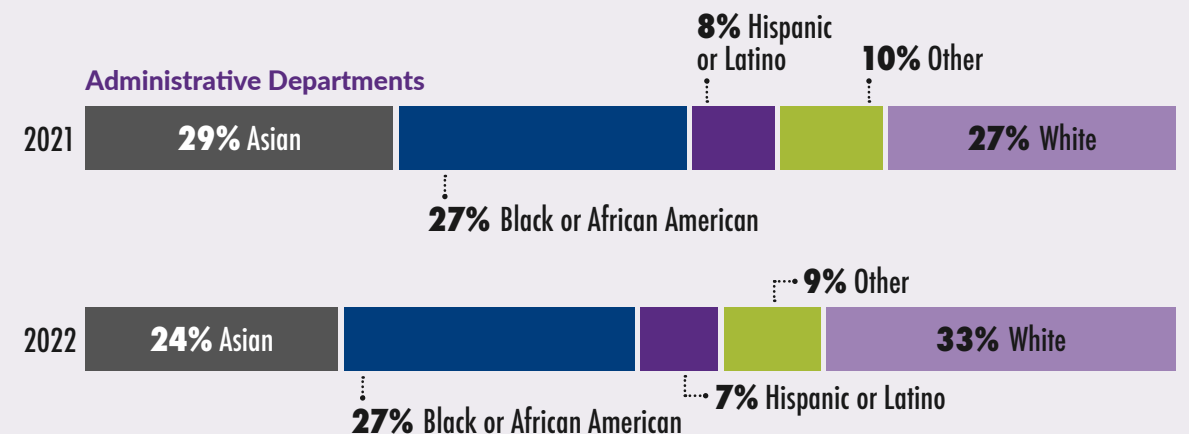
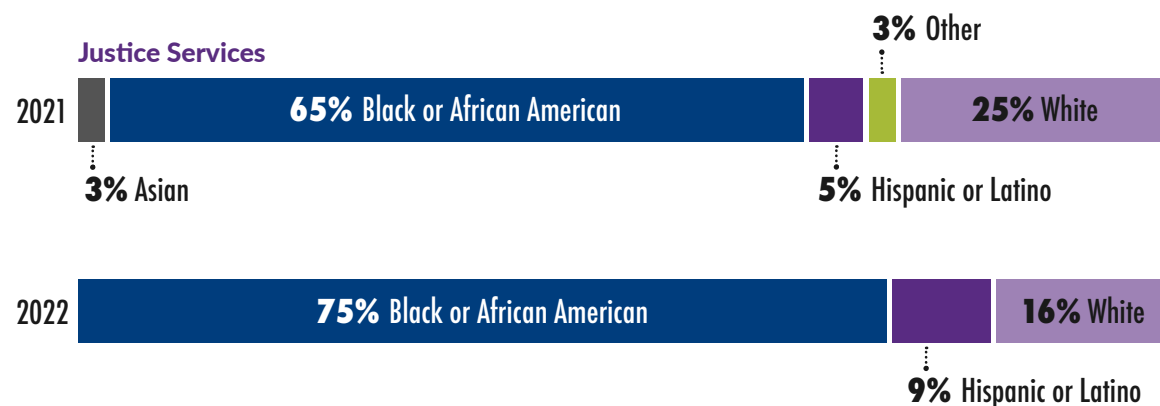
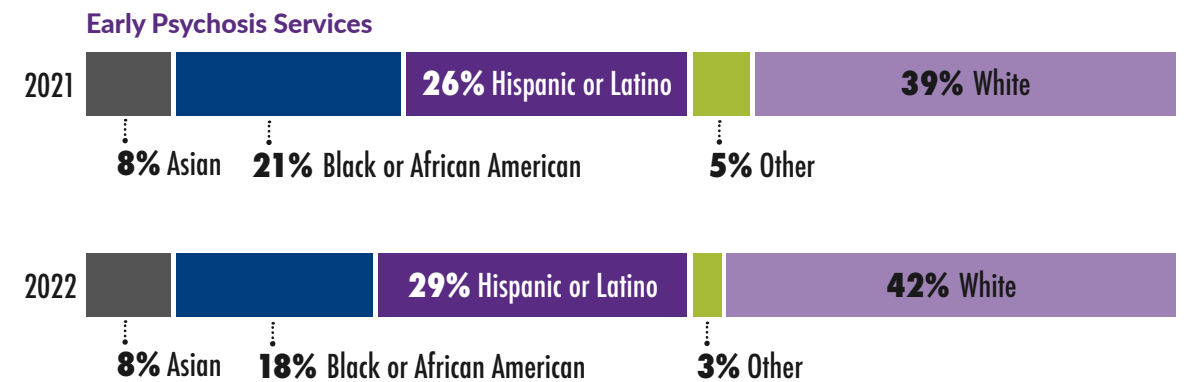
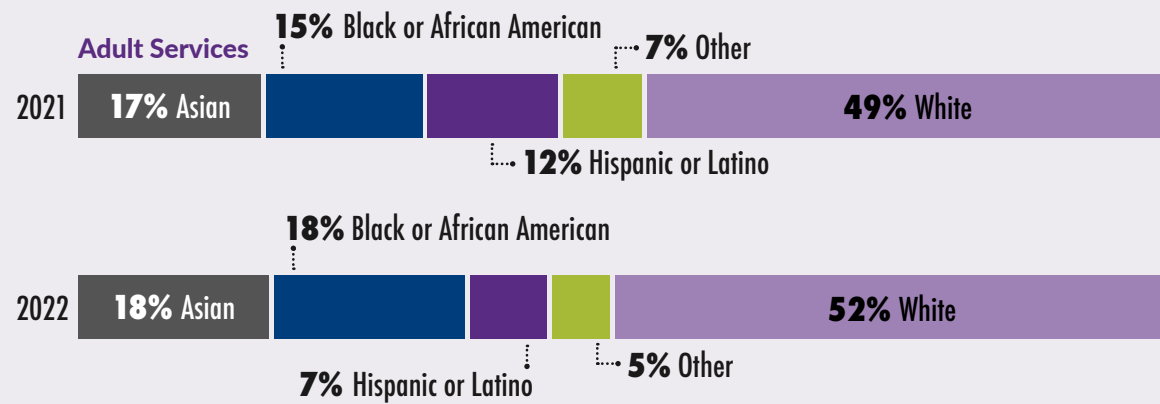
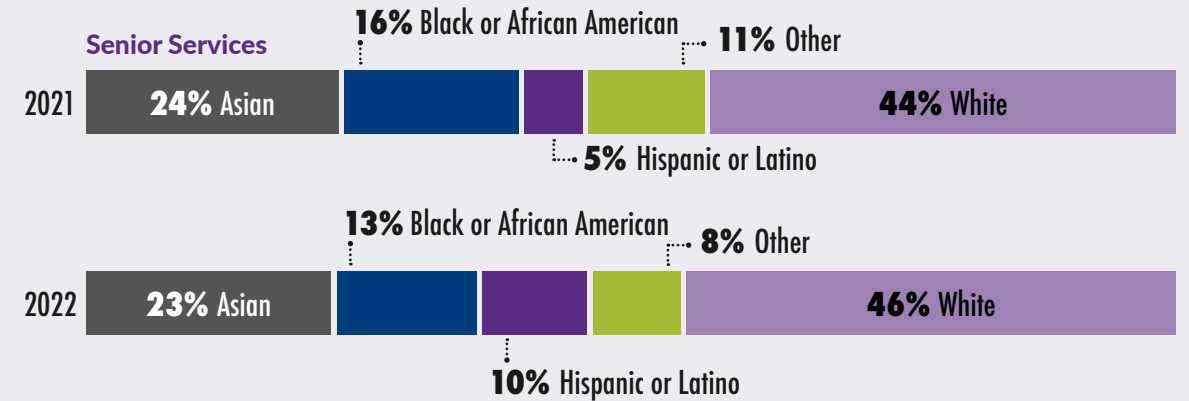
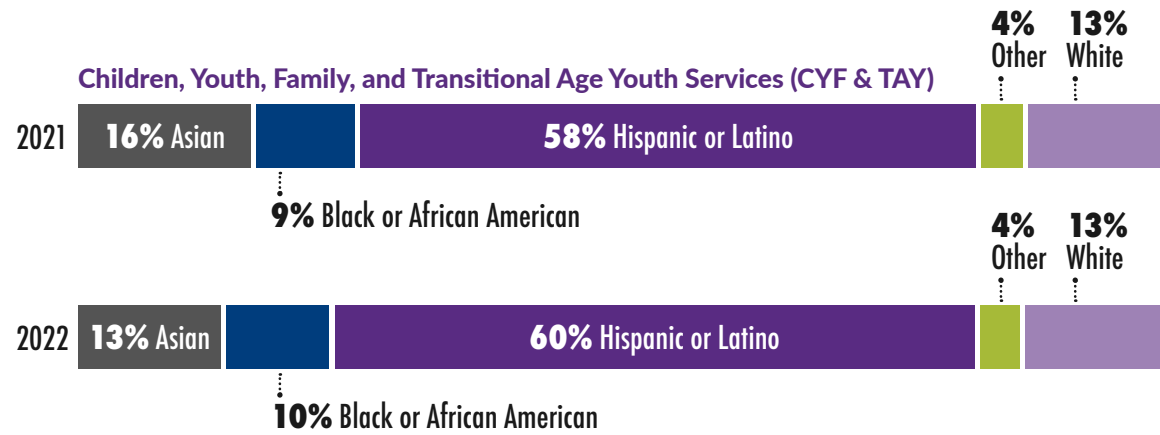
Employees By Age Groups



Our Commitment to Inclusion:
Felton Institute is committed to building a workplace with a sense of belonging for all, regardless of gender, ethnicity, sexual orientation, or age.



Employee Ethnicity By Division



board of DIRECTORS

Officers



Darren Skolnick
Felton Board Chair
Member since May 2017



Dr. George Woods
Felton Board Vice Chair
Member since January 2022



Tamara Steele
Felton Board Secretary
Member since October 2020

Directors



Susan Bobulsky
Member since June 2018



Dr. Oliver T. Brooks
Member since March 2022
Member, Governance Committee



Daniel Costello
Member since September 2021
Member, Program Committee



Clifford Nalls
Member since April 2022
Chair, Finance Committee



Kathy Neal
Member since March 2021
Co-Chair, Governance Committee



Michael Orias
Member since May 2017
Member, Finance Committee



Peter Rojo
Member since June 2019
Co-Chair, Governance Committee



Deborah Wafer
Member since March 2022
Co-Chair, Development Committee
Co-Chair, Program Committee

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p. 2-3, 30 (CEO & Felton Board Members)

This report was produced by the Felton Institute Communications Department

Sarah Tiffany Richardson-Baker
Director, Communications
and Community Engagement

Nicole Verduzco
Communications Project Manager

Nina Elkin
Design Lead

Jaimee McKinley
Graphic and Web Designer

Tiffany Hearsey
Content Writer and Creator

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to get involved visit www.felton.org

The logo for Felton Institute, featuring the words "Felton" and "institute" in a white, sans-serif font, stacked vertically and enclosed within a thin yellow square border.

Felton
institute



San Francisco Headquarters
1500 Franklin Street,
San Francisco, CA 94109



East Bay Headquarters
1005 Atlantic Avenue,
Alameda, CA 94501



www.felton.org



(415) 474-7310



info@felton.org