



**AGENDA**  
**BOARD OF DIRECTORS MEETING**  
Wednesday, November 8, 2023, 6:00 pm  
1<sup>st</sup> floor Community Room, Administrative office  
138 S. Brandon Road., Fallbrook, CA 92028  
*\*All meetings are hybrid unless otherwise noted.*

\*Please contact the Board clerk for language translation services 48 hours in advance of the meeting.  
In accordance with California Government Code Section 54953 teleconferencing will be used for this meeting. Board members, staff and members of the public will be able to participate by webinar by using the following link:  
<https://us02web.zoom.us/j/85092529608?pwd=Y21JN1lyVUc2T3pndiijS3pQNHkxZz09>  
Meeting ID: 850 9252 9608. Passcode: 336866 Participants will need to download the Zoom app on their mobile device. Members of the public will also be able to participate by telephone using the following number: +1-669-900-6833 Meeting ID: 850 9252 9608. Passcode: 336866

**A. CALL MEETING TO ORDER / ROLL CALL / ESTABLISH A QUORUM / PLEDGE OF ALLEGIANCE**

**B. APPROVAL OF THE AGENDA**

**C. PUBLIC COMMENTS - ANNOUNCEMENT**

Members of the public may address the Board regarding any item listed on the Agenda at the time the item is being considered. Members of the public may also speak on any item not listed on the Agenda which falls within the subject matter jurisdiction of the District immediately prior to Board Comments & Items for Subsequent Meetings section below. Members of the public attending in-person need to fill-out a "Request to Speak" card and those attending by webinar need to raise their hand at this time and identify the Agenda item they would like to speak on. The Board has a policy limiting any speaker to not more than five minutes.

**D. PRESENTATION – Local Agency Formation Commission (LAFCO) of San Diego -**

**E. CONSENT ITEMS -**

- E1. Minutes of October 4, 2023, Finance Meeting
- E2. Minutes of October 11, 2023, Board of Directors Meeting
- E3. Minutes of October 18, 2023, Facilities Meeting
- E4. Minutes of October 18, 2023, Strategic Planning Meeting
- E5. Minutes of October 25, 2023, Special Board of Directors Meeting
- E6. Finance Committee Report – Directors Brown and Jeffries  
Recommendation from Finance Committee to transfer \$94,000 from LAIF to the Operating fund.
- E7. Facilities Committee Report– Directors Jeffries and Mroz
- E8. Strategic Planning Committee Report– Directors Leach and Mroz
- E9. Governmental & Public Engagement Report– Directors Stanicek and Leach
- E10. Chief Executive Officer Report – Rachel Mason
- E11. General Counsel Report– Jeffrey Scott
- E12. CHC – Grant Impact Reports
- E13. Fiscal Year 23 -24 Investment Policy Statement

**F. ACTION ITEMS –**

- F1. Site LogiQ – Solar Infrastructure Project at the Community Health & Wellness Center
- F2. CA CLASS/CalTrust transfer update:

Recommend that we keep the funds within CalTrust, and not transfer to CA CLASS. Instead, we transfer 1 million from Med-Term fund to Liquidity fund.

**G. DISCUSSION ITEMS-**

G1. Discussion of the District's Three – Five Year Strategic Goals

- Clinical Services /Program Priorities
- Use of District Facilities
- Use of a third-party facilitator to facilitate an in-depth District Strategic Plan – to include longer term goals, objectives, and evaluation.

**H. BOARD MEMBER COMMENTS & ITEMS FOR SUBSEQUENT MEETINGS -**

Other Director/Staff discussion item. Item(s) for future board agendas-

**Announcements of upcoming events:**

See the District website event calendar at <https://www.fallbrookhealth.org/community-health-wellness-center>

**Facilities Committee** - 3<sup>rd</sup> Wednesday, **November 15, 2023**, at **10:00 am**.

**Strategic Planning Committee** - 3<sup>rd</sup> Wednesday, **November 15, 2023**, at **5:30 pm**.

**Governmental and Public Engagement Committee** – 4<sup>th</sup> Wednesday, **November 29, 2023**, at **5:30 pm**.

**Finance Committee** – 1<sup>st</sup> Wednesday, **December 6, 2023**, at **10:00 am**.

**Next Board of Directors Meeting** – 2<sup>nd</sup> Wednesday, **December 13, 2023**, at **6:00 pm**.

**I. ADJOURNMENT-**

**NOTE:** I certify that on Friday, November 3, 2023 I posted a copy of the foregoing agenda near the regular meeting place of the Board of Directors of Fallbrook Regional Health District, said time being at least 72 hours in advance of the meeting. The American with Disabilities Act provides that no qualified individual with a disability shall be excluded from participation in, or denied the benefits of District business. If you need assistance to participate in this meeting, please contact the District office 24 hours prior to the meeting at 760-731-9187.

\*Please contact the Board clerk for language translation services 48 hours before the meeting.



Executive Assistant / Board Clerk

**PRESENTATION:**

**LAFCO**

**Local Agency Formation Commission of San Diego**



## MINUTES

### FINANCE COMMITTEE

Wednesday, October 4, 2023, at 10:00 A.M.  
Administrative Office, 1<sup>st</sup> Floor Community Room  
138 S. Brandon Rd., Fallbrook, CA

In accordance with California Government Code Section 54953 teleconferencing was used for this meeting. Board members, staff and members of the public were able to participate in the webinar.

#### 1. Call to Order/Roll Call

In attendance: Director Brown and Director Jeffries, CEO Rachel Mason, Administrative Officer Judith Oswald, Community Health & Wellness Center Administrator Theresa Geracitano, CPA Susan Woodward

#### 2. Public Comments - Announcement

None

#### 3. Review of Financial Statements for August 2023

Report 1 – Balance Sheet of **August 2023**

Report 2 – Income Statement for the Month Ended **August 2023 & Fiscal Year to Date**

Report 3 – Profit & Loss Actual vs YTD Budget – **August 2023**

Report 4 – Local Agency Investment Fund (LAIF) Statement - **August 2023**

Report 5 – CalTrust Statement – **August 2023**

Report 6 – California CLASS Statement- **August 2023**

FRHD Compliance Report

Report 7 - Check Detail Report as of **August 2023**

Report 8 – VISA Credit Card Statement – **August 2023**

Report 9 – Community Development Disbursement as of **August 2023**

#### 5. Discussion Items-

Review FY22.23 Audit DRAFT

Recommendation from the Finance Committee to the Board to approve the Audit draft.

#### 6. Board Member Comments and Future Agenda Items-

None

#### 7. Adjournment-

There being no further business the meeting was adjourned at 10:32 AM.

A handwritten signature in blue ink that reads "August Wilbi". The signature is fluid and cursive, with the first name "August" and last name "Wilbi" clearly distinguishable.

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Executive Assistant/Board Clerk

DRAFT



**MINUTES**  
**BOARD OF DIRECTORS MEETING**

**Wednesday, October 11, 2023, 6:00 pm**  
**1<sup>st</sup> floor Community Room, Administrative office**  
**138 S. Brandon Road., Fallbrook, CA 92028**

*\*All meetings are hybrid unless otherwise noted.*

In accordance with California Government Code Section 54953 teleconferencing was used for this meeting. Board members, staff and members of the public were able to participate in the webinar.

**A. CALL MEETING TO ORDER / ROLL CALL / ESTABLISH A QUORUM / PLEDGE OF ALLEGIANCE**

Chair Bill Leach called the meeting to order at 6:00 p.m. and led the Pledge of Allegiance.

In attendance: Directors Barbara Mroz, Jennifer Jeffries, Terry Brown, CEO Rachel Mason, Accountant Susan Woodward, Legal Counsel Jeffrey Scott, and Property Manager Roy Moosa.

Staff members: Executive Assistant Raquel Williams, Administrative Officer Judith Oswald, Community Health & Wellness Center Administrator Theresa Geracitano

**B. APPROVAL OF THE AGENDA**

**Action:** It was moved by Director Leach seconded by Director Brown to approve the agenda as presented.

**Motion carried (4-0)**

Director Leach...Aye

Director Jeffries...Aye

Director Brown...Aye

Director Mroz...Aye

**C. PUBLIC COMMENTS – ANNOUNCEMENT**

Robin Nation, Marta Foraker, Greg & Suzanne Lundin, Cindy Luster, Elizabeth Cheatham, Roxanna Read shared their positive experiences with the Diabetes Prevention Program and their love and admiration for Programs Coordinator, Bianca Heyming they asked the Board to please continue with the Diabetes Prevention Program as it has changed their lives.

**D. PRESENTATION-**

D1. Lifestyle Change Program - Diabetes Prevention Program- Programs Coordinator, Bianca Heyming

D2. Youth Fitness Grants BIG CHECK Presentation to the Boys & Girls Clubs of North County, Boys Warriors Soccer Booster and Fallbrook Band Boosters. Bonsall Fallbrook Little League will take place at another time.

**E. CONSENT ITEMS -**

E1. Minutes of August 2, 2023, Finance Meeting

E2. Minutes of August 9, 2023, Board of Directors Meeting

E3. Finance Committee Report – Directors Brown and Jeffries

E4. Facilities Committee Report– Directors Jeffries and Mroz

E5. Strategic Planning Committee Report– Directors Leach and Mroz

E6. Governmental & Public Engagement Report– Directors Stanicek and Leach

E7. Chief Executive Officer Report – Rachel Mason

E8. General Counsel Report– Jeffrey Scott

E9. Approval of 2023 CEO Contract Amendment

E10. J. Moss Foundation/Skinny Gene DPP Lifestyle Change Program Contract and MOU

**Action:** It was moved by Director Brown seconded by Director Jeffries to approve the consent items as presented.

**Motion carried (4-0)**

Director Leach...Aye

Director Jeffries...Aye

Director Brown...Aye

Director Mroz...Aye

Chair Leach asked for a report on the Districts and Lions Club Gift of Sight Event from September 30. Theresa shared some of the data. 152 vision screenings were done, 5 clients were referred for treatment of eye diseases. 60 clients received glasses for the first time and a total of 124 pairs of eyeglasses were distributed. Dental screenings, flu vaccinations and local entertainment. We had over 300 attendees.

**F. DISCUSSION/POSSIBLE ACTION ITEMS –**

F1. Review of 2023 Audit – Audit Report and Letter attached to the minutes.

F2. Recommendation from Finance to transfer funds from CalTrust to CA CLASS- Director Brown would like to make a recommendation to the Board to transfer \$3million out of CalTrust Account and transfer to the California Class investment account.

**Action:** It was moved by Director Brown seconded by Director Jeffries to transfer \$3million from CalTrust to CA CLASS investment account.

**Motion carried (4-0)**

Director Leach...Aye

Director Jeffries...Aye

Director Brown...Aye

Director Mroz...Aye

F3. Review of Site LogIQ Summary Proforma- Rebate information will be decreasing the cost of the entire project, and they are planning to come back with updated numbers. Chair Leach is asking the board to prepare and present their questions for the vendor to move this along. A special meeting has been called for further discussion.

**G. BOARD MEMBER COMMENTS & ITEMS FOR SUBSEQUENT MEETINGS -**

Other Director/Staff discussion item. Item(s) for future board agendas

None

**H. ADJOURNMENT-**

There being no further business the meeting was adjourned at 7:45 pm



Executive Assistant / Board Clerk



## MINUTES

### FACILITIES COMMITTEE MEETING

Wednesday, October 18, 2023, at 10:00 A.M.

Administrative Office, 1<sup>st</sup> Floor Community Room, 138 S. Brandon Rd., Fallbrook CA 92028

In accordance with California Government Code Section 54953 teleconferencing was used for this meeting. Board members, staff and members of the public were able to participate in the webinar.

#### 1. CALL MEETING TO ORDER/ROLL CALL

Director Jeffries and Director Mroz present

CEO Rachel Mason, Community Health & Wellness Center Administrator Theresa Geracitano, Administrative Officer Judith Oswald, Board Clerk Raquel Williams

#### 2. PUBLIC COMMENTS - ANNOUNCEMENT

None

#### 3. DISCUSSION ITEMS

Ongoing/Completed Projects at the Community Health & Wellness Center

- a) Building B- Education Rooms 3-6 Conversion- CEO Rachel Mason shared with the committee that these rooms are large enough to accommodate larger groups and best suited for a conversion since we do not have the ability to use building A at this time. Building A- Community Room HVAC- CEO Mason would like to make sure that the new HVAC system is large enough to accommodate any future changes that are done to Building A. The committee agrees and approves that CEO Mason start the process for estimates on the HVAC system.
- b) Begin preparation of Parking Lot paving project -SiteLogiQ proposal- CEO Mason reminded the committee that there will be a special meeting for this item on October 25.
- c) FirstNet/AT&T Public Safety Communications Tower- CEO Mason shared that she is still in negotiations with the agency and a final contract will be coming soon.

#### 4. BOARD MEMBER COMMENTS AND FUTURE AGENDA ITEMS-

None

#### 5. ADJOURNMENT -

There being no further business the meeting was adjourned at 10:47am.

A handwritten signature in blue ink, appearing to read "Raquel Williams", is written over a horizontal line.

Executive Assistant/Board Clerk





## **MINUTES STRATEGIC PLANNING COMMITTEE**

**Wednesday, October 18, 2023, at 5:30 P.M.**

**Administrative Office, 1<sup>st</sup> Floor Community Room, 138 S. Brandon Rd., Fallbrook**

**In accordance with California Government Code Section 54953 teleconferencing was used for this meeting. Board members, staff and members of the public were able to participate in the webinar.**

### **1. CALL MEETING TO ORDER/ROLL CALL –**

Director Bill Leach and Director Barbara Mroz, CEO Rachel Mason, Administrative Officer Judith Oswald, Community Health & Wellness Center Administrator Theresa Geracitano, Executive Assistant Raquel Williams

### **2. PUBLIC COMMENTS – ANNOUNCEMENT**

None

### **3. DISCUSSION ITEMS-**

The new 3–5–year Roadmap- Chair Leach is pleased to be having this meeting after the Mission | Vision | Values revamp and he would like to have collaboration from the staff as well as the board to build out a new Strategic Plan by December. Chair Leach wants to highlight important aspects such as highly skilled staff, board member training, recognition as a special district, and programs aimed at improving lifespan. He suggests exploring administrative goals and opening the discussion to staff members. Chair Leach proposes discussing strategic objectives at the next board meeting and encourages input from other employees not present. The possibility of presentations on special districts and or a webinar on strategic planning, sharing recordings with board members, and getting feedback from staff members for further discussions. Director Mroz agrees.

CEO Mason also agrees but the timeline may be too ambitious. After many conversations around the types of services we offer we know that the need for clinical care is a long-term goal whether it's Urgent Care or primary care through a partnership. Understanding that our grant process is going to probably continue to evolve. A deeper conversation with the Board will be needed to gauge the level of tolerance for change, whether its increase or decrease those percentages and possible move towards the MOU (Memorandum of Understanding) for consistent services and move them out of the grant cycle so that we know what's real grant dollars versus programming.

### **4. BOARD MEMBER COMMENTS AND FUTURE AGENDA ITEMS-**

None

**5. ADJOURNMENT-**

There being no further business the meeting was adjourned at 6:45 pm.



August Wilby

Board Secretary/Clerk

DRAFT



## MINUTES SPECIAL BOARD OF DIRECTORS MEETING

Wednesday, October 25, 2023, 6:00 pm  
1<sup>st</sup> floor Community Room, Administrative office  
138 S. Brandon Road., Fallbrook, CA 92028  
**\*All meetings are hybrid unless otherwise noted.**

In accordance with California Government Code Section 54953 teleconferencing was used for this meeting. Board members, staff and members of the public were able to participate in the webinar.

### A. CALL MEETING TO ORDER / ROLL CALL / ESTABLISH A QUORUM / PLEDGE OF ALLEGIANCE

Chair Bill Leach called the meeting to order at 6:00 p.m. and led the Pledge of Allegiance. In attendance: Directors Barbara Mroz, Terry Brown, Mike Stanicek, CEO Rachel Mason, Legal Counsel Jeffrey Scott, and Property Manager Roy Moosa. Staff members: Executive Assistant Raquel Williams, Administrative Officer Judith Oswald, Community Health & Wellness Center Administrator Theresa Geracitano, Director Jeffries was absent. Josh Steeber, Jonathan Brown, Gaby-Project Development Manager, and David Cook from Site LogiQ & Tom Frew

### B. APPROVAL OF THE AGENDA

**Action:** It was moved by Director Brown seconded by Director Mroz to approve the agenda as presented.

**Motion carried (4-0)**

Director Leach...Aye

Director Stanicek...Aye

Director Brown....Aye

Director Mroz...Aye

### C. PUBLIC COMMENTS - ANNOUNCEMENT

None

### D. DISCUSSION/POSSIBLE ACTION ITEMS –

Josh Steeber and Jonathan Brown of Site LogiQ presented the proforma of the Solar Infrastructure Project at the Community Health & Wellness Center. They explained the cost breakdown and scope of work to the Board of Directors. Proforma included with the minutes. Director Brown asked if there are similar projects that SiteLogiQ has done locally and how they have held up.

Legal Counsel, Jeff Scott asked about the government codes and prevailing wages. Jonathan informed the Board that Gov. Code 4217 allows public agencies to use future cost avoidance and savings to pay for the upfront costs of energy efficiency measures through a guaranteed savings program. Jonathan also explained that all subcontractors are competitive and pay prevailing wages.

Directors voiced concern over the cost of the asphalt and asked CEO Mason to get an estimate on just the parking lot portion without the solar component. Discussion ensued regarding options and costs of the project.

Staff was directed to research costs of EV charging units and to get some informal cost estimates for the asphalt paving.

**E. BOARD MEMBER COMMENTS & ITEMS FOR SUBSEQUENT MEETINGS -**

Other Director/Staff discussion item. Item(s) for future board agendas

Announcements of upcoming events:

See the District website event calendar at <https://www.fallbrookhealth.org/community-health-wellness-center>

**Finance Committee** – 1<sup>st</sup> Wednesday, **November 1, 2023**, at **10:00 am**.

**Next Board of Directors Meeting** – 2<sup>nd</sup> Wednesday, **November 8, 2023**, at **6:00 pm**.

**Facilities Committee** - 3<sup>rd</sup> Wednesday, **November 15, 2023**, at **10:00 am**.

**Strategic Planning Committee** - 3<sup>rd</sup> Wednesday, **November 15, 2023**, at **5:30 pm**.

**Governmental & Public Engagement Committee** – 4<sup>th</sup> Wednesday, **Nov. 29, 2023**, at **5:30 pm**.

**F. ADJOURNMENT-**

There being no further business the meeting was adjourned at 7:53 pm.



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Executive Assistant / Board Clerk

# Fallbrook Regional Health District

## Report #1 - Balance Sheet Comparison

As of September 30, 2023

	TOTAL		
	AS OF SEP 30, 2023	AS OF AUG 31, 2023 (PP)	% CHANGE
<b>ASSETS</b>			
Current Assets			
Bank Accounts			
Five Star Bank Account	200,000.00	250,000.00	-20.00 %
Pacific Western Bank - Checking	108,932.66	61,776.37	76.33 %
Petty Cash	138.47	138.47	0.00 %
<b>Total Bank Accounts</b>	<b>\$309,071.13</b>	<b>\$311,914.84</b>	<b>-0.91 %</b>
Other Current Assets			
Interest Receivable - LAIF	0.00	0.00	
Prepaid Insurance	27,238.54	30,265.04	-10.00 %
Reimbursement Receivable - CDD	787.22	-335.57	334.59 %
Tax Apportionment Receivable	39,158.93	18,369.18	113.18 %
<b>Total Other Current Assets</b>	<b>\$67,184.69</b>	<b>\$48,298.65</b>	<b>39.10 %</b>
<b>Total Current Assets</b>	<b>\$376,255.82</b>	<b>\$360,213.49</b>	<b>4.45 %</b>
Fixed Assets			
Accumulated Depreciation - All Buildings			
E. Mission Road	-260,973.40	-256,380.40	-1.79 %
E. Mission Road - Improvements	1,441,539.86	1,441,539.86	0.00 %
E. Mission Road - Land	408,578.29	400,595.79	1.99 %
<b>Total E. Mission Road</b>	<b>2,210,747.15</b>	<b>2,202,764.65</b>	<b>0.36 %</b>
Equipment			
Equipment - Depreciation	85,471.17	85,471.17	0.00 %
Equipment - Depreciation	-57,862.26	-56,970.84	-1.56 %
S. Brandon Road	161,578.00	161,578.00	0.00 %
S. Brandon Road - Improvements	233,355.76	233,355.76	0.00 %
S. Brandon Road - Land	129,662.00	129,662.00	0.00 %
<b>Total S. Brandon Road</b>	<b>524,595.76</b>	<b>524,595.76</b>	<b>0.00 %</b>
<b>Total Fixed Assets</b>	<b>\$2,501,978.42</b>	<b>\$2,499,480.34</b>	<b>0.10 %</b>
Other Assets			
California Class	1,010,043.54	1,005,517.41	0.45 %
CalTrust	5,675,158.51	5,687,655.51	-0.22 %
LAIF	1,636,215.05	1,636,215.05	0.00 %
Note Receivable - East Alvarado Street	354,169.73	356,037.89	-0.52 %
<b>Total Other Assets</b>	<b>\$8,675,586.83</b>	<b>\$8,685,425.86</b>	<b>-0.11 %</b>
<b>TOTAL ASSETS</b>	<b>\$11,553,821.07</b>	<b>\$11,545,119.69</b>	<b>0.08 %</b>
<b>LIABILITIES AND EQUITY</b>			
Liabilities			
Current Liabilities			
Accounts Payable			
Accounts Payable (A/P)	24,247.52	39,370.72	-38.41 %
<b>Total Accounts Payable</b>	<b>\$24,247.52</b>	<b>\$39,370.72</b>	<b>-38.41 %</b>
Other Current Liabilities			
Payroll - Tax Payable	7,891.11	9,600.46	-17.80 %

	TOTAL		
	AS OF SEP 30, 2023	AS OF AUG 31, 2023 (PP)	% CHANGE
Payroll - Vacation & Sick Payable	46,947.06	47,153.96	-0.44 %
Payroll - Wages Payable	20,746.30	23,941.36	-13.35 %
Simple IRA Plan - Payable	4,824.77	3,411.95	41.41 %
<b>Total Other Current Liabilities</b>	<b>\$80,409.24</b>	<b>\$84,107.73</b>	<b>-4.40 %</b>
<b>Total Current Liabilities</b>	<b>\$104,656.76</b>	<b>\$123,478.45</b>	<b>-15.24 %</b>
<b>Total Liabilities</b>	<b>\$104,656.76</b>	<b>\$123,478.45</b>	<b>-15.24 %</b>
Equity			
Community Development Disbursement	8,856,578.12	8,792,578.12	0.73 %
Opening balance equity	0.00	0.00	
Retained Earnings	0.00	0.00	
Unrestricted Operations Fund	2,878,900.88	2,878,900.88	0.00 %
Net Income	-286,314.69	-249,837.76	-14.60 %
<b>Total Equity</b>	<b>\$11,449,164.31</b>	<b>\$11,421,641.24</b>	<b>0.24 %</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$11,553,821.07</b>	<b>\$11,545,119.69</b>	<b>0.08 %</b>

# Fallbrook Regional Health District

## Report #2 - Profit and Loss & Fiscal YTD

September 2023

	TOTAL	
	SEP 2023	JUL - SEP, 2023 (YTD)
Income		
Property Tax Revenue	39,158.93	97,235.98
<b>Total Income</b>	<b>\$39,158.93</b>	<b>\$97,235.98</b>
<b>GROSS PROFIT</b>	<b>\$39,158.93</b>	<b>\$97,235.98</b>
Expenses		
Advertising & Promotions	95.00	2,391.03
Ask My Accountant	0.00	0.00
Auto Expenses	640.93	1,044.19
Bank Fees & Service Charges	20.13	20.13
Community Health Contracts		
Bonsall/Fallbrook Little League		5,000.00
Boys & Girls Club of North County		32,233.25
Boys Warriors Soccer Booster, Inc.		5,000.00
Community Health Systems, Inc.		15,000.00
Fallbrook Band Boosters		5,000.00
Fallbrook Food Pantry		18,750.00
Fallbrook Senior Citizens		11,750.00
Foundation for Senior Care		35,000.00
Michelle's Place Cancer Ctr		12,165.50
NC Fire JPA (EMSO)	20,504.91	20,504.91
Palomar Family Counseling		16,715.00
Reins Therapeutic Horsemanship Program		6,250.00
<b>Total Community Health Contracts</b>	<b>20,504.91</b>	<b>183,368.66</b>
District Direct Care Services	571.58	571.58
District Sponsored Events	1,400.80	1,406.70
Health Services & Clinics	16.47	35.11
<b>Total District Direct Care Services</b>	<b>1,988.85</b>	<b>2,013.39</b>
Dues & Subscriptions		8,915.02
Education & Conferences	5,480.34	16,072.49
Equipment Lease	1,669.84	4,854.94
General Insurance	2,715.58	8,146.74
IT Services	600.00	1,800.00
Legal & Accounting services		
Accounting	3,338.75	10,016.25
Independent Audit		8,000.00
<b>Total Legal &amp; Accounting services</b>	<b>3,338.75</b>	<b>18,016.25</b>
Medical Records Expense	2,742.75	7,954.68
Meeting Expenses	132.25	524.48
Office Expenses		
General Office Expenses	453.71	1,336.45
Maintenance & Repairs	7,438.14	22,781.62
Office Equipment & Fixtures	1,245.04	4,963.54
Office Supplies	1,824.24	5,150.88

	TOTAL	
	SEP 2023	JUL - SEP, 2023 (YTD)
Postage & Shipping	-77.29	111.41
Software & Website	606.22	2,082.06
<b>Total Office Expenses</b>	<b>11,490.06</b>	<b>36,425.96</b>
Payroll Expenses		
Accrued Vacation & Sick Leave	-206.90	-206.90
Board Stipends	1,874.25	6,174.00
Employee Benefits	7,757.80	23,524.58
Payroll Processing Fees	263.23	789.69
Payroll Taxes	4,254.91	12,996.48
Salaries	54,784.90	166,617.87
Simple IRA Match	2,674.75	3,998.82
Workers Compensation	1,068.92	1,690.76
<b>Total Payroll Expenses</b>	<b>72,471.86</b>	<b>215,585.30</b>
Property Management Fees	787.50	787.50
Utilities		
Cell Phones	350.00	1,050.00
General Utilities	3,032.81	9,927.24
Internet/Phone	793.84	793.84
Internet/Telephone	79.80	2,933.89
<b>Total Utilities</b>	<b>4,256.45</b>	<b>14,704.97</b>
<b>Total Expenses</b>	<b>\$128,935.20</b>	<b>\$522,625.73</b>
NET OPERATING INCOME	<b>\$ -89,776.27</b>	<b>\$ -425,389.75</b>
Other Income		
Interest/Dividend Income	23,009.04	65,868.89
Unearned Gain/Loss CalTRUST	-29,348.07	-23,513.60
Unrealized Gain/Loss - LAIF		39,669.25
<b>Total Other Income</b>	<b>\$ -6,339.03</b>	<b>\$82,024.54</b>
Other Expenses		
Community Development Disbursements	-65,122.79	-65,122.79
Depreciation Expense		
Depreciation Expense - Brandon Road	1,480.92	4,442.76
Depreciation Expense - Mission Road	4,003.50	12,010.50
<b>Total Depreciation Expense</b>	<b>5,484.42</b>	<b>16,453.26</b>
Other Miscellaneous Expense		-8,380.99
<b>Total Other Expenses</b>	<b>\$ -59,638.37</b>	<b>\$ -57,050.52</b>
NET OTHER INCOME	<b>\$53,299.34</b>	<b>\$139,075.06</b>
NET INCOME	<b>\$ -36,476.93</b>	<b>\$ -286,314.69</b>



**Fallbrook Regional Health District**  
**Report #3 - Budget vs. Actuals: FY 23-24 - Administrative Class**  
 July - September, 2023

	Administrative			
	Actual	Budget	over Budget	% of Budget
<b>Income</b>				
Property Tax Revenue	97,235.98	91,681.32	5,554.66	106.06%
Rental Income		6,902.50	-6,902.50	0.00%
<b>Total Income</b>	<b>\$ 97,235.98</b>	<b>\$ 98,583.82</b>	<b>-\$ 1,347.84</b>	<b>98.63%</b>
<b>Gross Profit</b>	<b>\$ 97,235.98</b>	<b>\$ 98,583.82</b>	<b>-\$ 1,347.84</b>	<b>98.63%</b>
<b>Expenses</b>				
Advertising & Promotions	581.18	6,625.00	-6,043.82	8.77%
Auto Expenses	888.89	600.18	288.71	148.10%
Community Health Contracts			0.00	
Boys & Girls Club of North County	32,233.25	27,233.25	5,000.00	118.36%
Community Health Systems, Inc.	15,000.00	15,000.00	0.00	100.00%
Fallbrook Food Pantry	18,750.00	18,750.00	0.00	100.00%
Fallbrook Senior Citizens	11,750.00	11,750.00	0.00	100.00%
Foundation for Senior Care	35,000.00	35,000.00	0.00	100.00%
Michelle's Place Cancer Ctr	12,165.50	12,165.50	0.00	100.00%
NC Fire JPA (Ambulance)		161,250.00	-161,250.00	0.00%
Palomar Family Counseling	16,715.00	16,715.00	0.00	100.00%
Reins Therapeutic Horsemanship Program	6,250.00	6,250.00	0.00	100.00%
<b>Total Community Health Contracts</b>	<b>\$ 147,863.75</b>	<b>\$ 304,113.75</b>	<b>-\$ 156,250.00</b>	<b>48.62%</b>
District Direct Care Services			0.00	
District Sponsored Events		750.00	-750.00	0.00%
<b>Total District Direct Care Services</b>	<b>\$ 0.00</b>	<b>\$ 750.00</b>	<b>-\$ 750.00</b>	<b>0.00%</b>
Dues & Subscriptions	8,915.02	10,300.00	-1,384.98	86.55%
Education & Conferences	14,952.77	15,225.00	-272.23	98.21%
Equipment Lease	2,466.13	4,856.65	-2,390.52	50.78%
General Insurance	4,073.37	3,799.62	273.75	107.20%
IT Services	1,800.00	900.00	900.00	200.00%
Legal & Accounting services			0.00	
Accounting	10,016.25	9,300.00	716.25	107.70%
Independent Audit	8,000.00	16,500.00	-8,500.00	48.48%
Legal		10,125.00	-10,125.00	0.00%
<b>Total Legal &amp; Accounting services</b>	<b>\$ 18,016.25</b>	<b>\$ 35,925.00</b>	<b>-\$ 17,908.75</b>	<b>50.15%</b>
Medical Records Expense	7,954.68	7,778.55	176.13	102.26%
Meeting Expenses	420.99	212.49	208.50	198.12%
Office Expenses			0.00	
General Office Expenses	979.16	500.00	479.16	195.83%
Maintenance & Repairs	6,260.46	12,957.00	-6,696.54	48.32%
Office Supplies	1,278.91	3,500.00	-2,221.09	36.54%
Postage & Shipping	111.41	240.00	-128.59	46.42%
Software & Website	2,037.06	3,279.00	-1,241.94	62.12%

<b>Total Office Expenses</b>	<b>\$ 10,667.00</b>	<b>\$ 20,476.00</b>	<b>-\$ 9,809.00</b>	<b>52.10%</b>
<b>Payroll Expenses</b>			0.00	
<b>Board Stipends</b>	6,174.00	10,350.00	-4,176.00	59.65%
<b>Employee Benefits</b>	12,003.30	21,155.85	-9,152.55	56.74%
<b>Payroll Processing Fees</b>	789.69	995.94	-206.25	79.29%
<b>Payroll Taxes</b>	8,749.61	8,852.85	-103.24	98.83%
<b>Salaries</b>	107,690.43	110,660.49	-2,970.06	97.32%
<b>Simple IRA Match</b>	2,649.98	3,319.80	-669.82	79.82%
<b>Workers Compensation</b>	1,224.38	276.00	948.38	443.62%
<b>Total Payroll Expenses</b>	<b>\$ 139,281.39</b>	<b>\$ 155,610.93</b>	<b>-\$ 16,329.54</b>	<b>89.51%</b>
<b>Property Management Fees</b>	787.50	200.00	587.50	393.75%
<b>Utilities</b>			0.00	
<b>Cell Phones</b>	600.00	375.00	225.00	160.00%
<b>General Utilities</b>	4,089.39	3,342.50	746.89	122.35%
<b>Internet/Phone</b>	302.93	1,530.00	-1,227.07	19.80%
<b>Total Utilities</b>	<b>\$ 4,992.32</b>	<b>\$ 5,247.50</b>	<b>-\$ 255.18</b>	<b>95.14%</b>
<b>Total Expenses</b>	<b>\$ 363,661.24</b>	<b>\$ 572,620.67</b>	<b>-\$ 208,959.43</b>	<b>63.51%</b>
<b>Net Operating Income</b>	<b>-\$ 266,425.26</b>	<b>-\$ 474,036.85</b>	<b>\$ 207,611.59</b>	<b>56.20%</b>
<b>Other Income</b>				
<b>Interest/Dividend Income</b>	65,868.89	15,994.38	49,874.51	411.83%
<b>Total Other Income</b>	<b>\$ 65,868.89</b>	<b>\$ 15,994.38</b>	<b>\$ 49,874.51</b>	<b>411.83%</b>
<b>Net Other Income</b>	<b>\$ 65,868.89</b>	<b>\$ 15,994.38</b>	<b>\$ 49,874.51</b>	<b>411.83%</b>
<b>Net Income</b>	<b>-\$ 200,556.37</b>	<b>-\$ 458,042.47</b>	<b>\$ 257,486.10</b>	<b>43.79%</b>

Tuesday, Oct 24, 2023 02:24:06 PM GMT-7 - Accrual Basis

**Fallbrook Regional Health District**  
**Report #3 - Budget vs. Actuals: FY 23-24 - Wellness Center**  
 July - September, 2023

	Wellness Center			
	Actual	Budget	over Budget	% of Budget
<b>Income</b>				
Program Fees		0.00	0.00	
Wellness Center Income - Event/Space Rental		250.00	-250.00	0.00%
<b>Total Income</b>	<b>\$ 0.00</b>	<b>\$ 250.00</b>	<b>-\$ 250.00</b>	<b>0.00%</b>
<b>Gross Profit</b>	<b>\$ 0.00</b>	<b>\$ 250.00</b>	<b>-\$ 250.00</b>	<b>0.00%</b>
<b>Expenses</b>				
Advertising & Promotions	1,809.85	12,440.00	-10,630.15	14.55%
District Direct Care Services			0.00	
District Sponsored Events	1,406.70	5,500.00	-4,093.30	25.58%
Health Services & Clinics	35.11	16,060.00	-16,024.89	0.22%
<b>Total District Direct Care Services</b>	<b>\$ 1,441.81</b>	<b>\$ 21,560.00</b>	<b>-\$ 20,118.19</b>	<b>6.69%</b>
Dues & Subscriptions		608.00	-608.00	0.00%
Education & Conferences	1,119.72	9,150.00	-8,030.28	12.24%
Equipment Lease	2,388.81	2,829.15	-440.34	84.44%
General Insurance	4,073.37	3,799.62	273.75	107.20%
IT Services		900.00	-900.00	0.00%
Legal & Accounting services			0.00	
Legal		3,375.00	-3,375.00	0.00%
<b>Total Legal &amp; Accounting services</b>	<b>\$ 0.00</b>	<b>\$ 3,375.00</b>	<b>-\$ 3,375.00</b>	<b>0.00%</b>
Meeting Expenses	103.49	75.00	28.49	137.99%
Office Expenses			0.00	
General Office Expenses	357.29	500.00	-142.71	71.46%
Maintenance & Repairs	16,521.16	19,855.00	-3,333.84	83.21%
Office Supplies	3,871.97	6,500.00	-2,628.03	59.57%
<b>Total Office Expenses</b>	<b>\$ 20,750.42</b>	<b>\$ 26,855.00</b>	<b>-\$ 6,104.58</b>	<b>77.27%</b>
Payroll Expenses			0.00	
Employee Benefits	11,521.28	16,924.68	-5,403.40	68.07%
Payroll Processing Fees		556.38	-556.38	0.00%
Payroll Taxes	4,246.87	4,945.65	-698.78	85.87%
Salaries	58,927.44	61,820.49	-2,893.05	95.32%
Simple IRA Match	1,348.83	1,854.60	-505.77	72.73%
Workers Compensation	466.38	210.00	256.38	222.09%
<b>Total Payroll Expenses</b>	<b>\$ 76,510.80</b>	<b>\$ 86,311.80</b>	<b>-\$ 9,801.00</b>	<b>88.64%</b>
Property Management Fees		100.00	-100.00	0.00%
Utilities			0.00	
Cell Phones	450.00	300.00	150.00	150.00%
General Utilities	5,837.85	4,455.00	1,382.85	131.04%
Internet/Phone	490.91	1,620.00	-1,129.09	30.30%
<b>Total Utilities</b>	<b>\$ 6,778.76</b>	<b>\$ 6,375.00</b>	<b>\$ 403.76</b>	<b>106.33%</b>
<b>Total Expenses</b>	<b>\$ 114,977.03</b>	<b>\$ 174,378.57</b>	<b>-\$ 59,401.54</b>	<b>65.94%</b>

<b>Net Operating Income</b>	<b>-</b>	<b>\$ 114,977.03</b>	<b>-</b>	<b>\$ 174,128.57</b>	<b>\$</b>	<b>59,151.54</b>	<b>66.03%</b>
<b>Net Income</b>	<b>-</b>	<b>\$ 114,977.03</b>	<b>-</b>	<b>\$ 174,128.57</b>	<b>\$</b>	<b>59,151.54</b>	<b>66.03%</b>

Tuesday, Oct 24, 2023 02:25:06 PM GMT-7 - Accrual Basis

# California State Treasurer *Fiona Ma, CPA*



Local Agency Investment Fund  
P.O. Box 942809  
Sacramento, CA 94209-0001  
(916) 653-3001

October 07, 2023

[LAIF Home](#)  
[PMIA Average Monthly Yields](#)

FALLBROOK REGIONAL HEALTH DISTRICT

DISTRICT ADMINISTRATOR  
138 SOUTH BRANDON ROAD  
FALLBROOK, CA 92028

[Tran Type Definitions](#)

Account Number: XXXXXXXXXX

September 2023 Statement

Effective Date	Transaction Date	Tran Type	Confirm Number	Web Confirm Number	Authorized Caller	Amount
9/7/2023	9/6/2023	RW	1738279	N/A	TERRY BROWN	-64,000.00

**Account Summary**

Total Deposit:	0.00	Beginning Balance:	1,636,215.05
Total Withdrawal:	-64,000.00	Ending Balance:	1,572,215 05



CaITRUST  
 PO Box 2709  
 Granite Bay, CA 95746  
 www.caltrust.org  
 Email: admin@caltrust.org  
 Fax: 402-963-9094  
 Phone: 833-CALTRUST (225-8787)

## Investment Account Summary

09/01/2023 through 09/30/2023

### SUMMARY OF INVESTMENTS

Fund	Account Number	Total Shares Owned	Net Asset Value per Share on Sep 30 (\$)	Value on Sep 30 (\$)	Average Cost Amount (\$)	Cumulative Change in Value (\$)
<b>FALLBROOK REGIONAL HEALTH DISTRICT</b>						
CalTRUST Medium Term Fund		588,709.389	9.64	5,675,158.51	5,899,745.90	(224,587.39)
<b>Portfolios Total value as of 09/30/2023</b>				<b>5,675,158.51</b>		

### DETAIL OF TRANSACTION ACTIVITY

Activity Description	Activity Date	Amount (\$)	Amount in Shares	Balance in Shares	Price per Share (\$)	Balance (\$)	Average Cost Amt (\$)	Realized Gain/(Loss) (\$)
		<b>FALLBROOK REGIONAL HEALTH DISTRICT</b>			<b>Account Number: [REDACTED]</b>			
Beginning Balance	09/01/2023			586,961.353	9.69	5,687,655.51		
Accrual Income Div Reinvestment	09/29/2023	16,851.07	1,748.036	588,709.389	9.64	5,675,158.51	0.00	0.00
Change in Value						(29,348.07)		
<b>Closing Balance as of</b>	<b>Sep 30</b>			<b>588,709.389</b>	<b>9.64</b>	<b>5,675,158.51</b>		

Please note that this information should not be construed as tax advice and it is recommended that you consult with a tax professional regarding your account.



# Summary Statement

September 30, 2023

Page 1 of 3

Investor ID: [REDACTED]

0000078 0000300 PDF 574823

**Fallbrook Regional Health District**  
**138 South Brandon Road**  
**Fallbrook, CA 92028**

## California CLASS

### California CLASS

Average Monthly Yield: 5.4766%

		Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
[REDACTED]	FRHD_CLASS_Prime	1,005,517.41	0.00	0.00	4,526.13	10,043.54	1,005,819.15	1,010,043.54
<b>TOTAL</b>		<b>1,005,517.41</b>	<b>0.00</b>	<b>0.00</b>	<b>4,526.13</b>	<b>10,043.54</b>	<b>1,005,819.15</b>	<b>1,010,043.54</b>



Account Statement

September 30, 2023

Page 2 of 3

Account Number: [REDACTED]

FRHD\_CLASS\_Prime

Account Summary

Average Monthly Yield: 5.4766%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
California CLASS	1,005,517.41	0.00	0.00	4,526.13	10,043.54	1,005,819.15	1,010,043.54

Transaction Activity

Transaction Date	Transaction Description	Contributions	Withdrawals	Balance	Transaction Number
09/01/2023	Beginning Balance			1,005,517.41	
09/30/2023	Income Dividend Reinvestment	4,526.13			
09/30/2023	Ending Balance			1,010,043.54	





California CLASS

California CLASS

Date	Dividend Rate	Daily Yield
09/01/2023	0.000596808	5.4458%
09/02/2023	0.000000000	5.4459%
09/03/2023	0.000000000	5.4459%
09/04/2023	0.000000000	5.4459%
09/05/2023	0.000149371	5.4520%
09/06/2023	0.000149526	5.4577%
09/07/2023	0.000149713	5.4645%
09/08/2023	0.000448689	5.4591%
09/09/2023	0.000000000	5.4591%
09/10/2023	0.000000000	5.4591%
09/11/2023	0.000149708	5.4644%
09/12/2023	0.000149838	5.4691%
09/13/2023	0.000149787	5.4672%
09/14/2023	0.000149928	5.4724%
09/15/2023	0.000449910	5.4739%
09/16/2023	0.000000000	5.4739%
09/17/2023	0.000000000	5.4739%
09/18/2023	0.000150173	5.4813%
09/19/2023	0.000150079	5.4779%
09/20/2023	0.000150175	5.4814%
09/21/2023	0.000150475	5.4923%
09/22/2023	0.000451653	5.4951%
09/23/2023	0.000000000	5.4951%
09/24/2023	0.000000000	5.4951%
09/25/2023	0.000150331	5.4871%
09/26/2023	0.000150611	5.4973%
09/27/2023	0.000151007	5.5118%
09/28/2023	0.000151087	5.5147%
09/29/2023	0.000302426	5.5193%
09/30/2023	0.000000000	5.5193%

Performance results are shown net of all fees and expenses and reflect the reinvestment of dividends and other earnings. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**

### **LOCAL AGENCY INVESTMENT FUND (LAIF)**

Through the Pooled Money Investment Account (PMIA), the State Treasurer invests taxpayers' money to manage the State's cash flow and strengthen the financial security of local governmental entities. PMIA policy sets as primary investment objectives safety, liquidity and yield. Total assets under LAIF Management at month-end were \$22.4 billion.

As of September 30, 2023, the PMIA's holdings included US Treasury Bills and Notes (64.37% of portfolio), Federal Agency Debentures and Discount Notes (20.72% of portfolio), CDs and Commercial Paper (11.04% of portfolio).

As of September 30, 2023, the District's balance was \$1,572,215.05. This represents 19.01% of the District's investment portfolio. The Average Monthly Effective Yield for the month of September, 2023 was 3.534%. In September, 2023, the District reported \$0.00 in quarterly earnings.

### **CalTRUST**

The CalTRUST Board works closely with the investment manager, State Street Global Advisors, to ensure that public dollars are managed securely and efficiently and are in full compliance with California Law. The primary objective is to safeguard the preservation of principal.

The District is invested in the CalTRUST Medium Term Fund which held, in part, the following sectors at September 30, 2023: Corporate Bonds (22.62% of portfolio), US Government and Agencies (65.77% of portfolio) and CDs (0.55% of portfolio). Total assets under CalTRUST Management at month-end were \$3.1 billion.

As of September 30, the District's closing Net Asset Value was \$5,687,655.51. This represents 68.78% of the District's investment portfolio.

In September, 2023, the District earned \$16,851.07 in dividend income and reported an unrealized loss of \$29,348.07. The One Year Yield on the Medium-Term Fund was 3.09%

### **California CLASS**

The California Cooperative Liquid Assets Securities System (California CLASS) is a pooled investment option that invests in high-quality, short-to-medium-term securities that prioritizes principal preservation. The California CLASS management has appointed Public Trust Advisors, LLC to serve as the Investment Advisor and Administrator. As of September 30, the District's balance was \$1,010,043.54. This represents 12.21% of the District's investment portfolio. In September, 2023, the District reported \$4,526.13 in earnings. The 30-day average yield was 5.4766%.

The investments of the District are in compliance with the District's 2022-2023 Investment Policy. The balances in the District's investment accounts give the District the ability to meet its expenditure requirements for the next eighteen (18) months.

**Fallbrook Regional Health District**  
**Reort #7 - Check Detail**  
**September 2023**

	Date	Num	Name	Memo/Description	Amount
Pacific Western Bank - Checking	09/05/2023	13694	24 Hour Elevator Inc.		-249.17
	09/05/2023	13695	Brand Assasins		-888.49
	09/05/2023	13696	Culligan of San Diego		-79.50
	09/05/2023	13697	Darren Key		-132.00
	09/05/2023	13698	Fallbrook Waste & Recycling - E. Mission		-283.38
	09/05/2023	13699	Fish Window Cleaning		-635.00
	09/05/2023	13700	Jasmine Thomas		-24.89
	09/05/2023	13701	Juana Diaz		-440.00
	09/05/2023	13702	Kent Bandy		-1,375.00
	09/05/2023	13703	Knight Security & Fire Systems		-44.00
	09/05/2023	13704	Mike Stanicek		-1,631.52
	09/05/2023	13705	SDG&E - 5971 - E. Mission		-1,429.16
	09/05/2023	13706	SDG&E - 6994 - Brandon		-994.73
	09/05/2023	13707	Spectrum - Mission		-485.91
	09/05/2023	13708	Spectrum Business-Brandon		-302.93
	09/05/2023	13709	Springston Design LLC		-600.00
	09/05/2023	13710	Susan Woodward		-1,500.00
	09/05/2023	13711	Terry Brown		-1,878.00
	09/05/2023	13712	Langdon Floorcovering		-6,300.00
	09/05/2023	13713	JK Drywall and Construction		-3,100.00
	09/05/2023	13714	JK Drywall and Construction		-2,900.00
	09/05/2023	13715	JK Drywall and Construction		-1,400.00
	09/05/2023	13716	JK Drywall and Construction		-1,725.00
	09/19/2023	13717	Amazon Capital Services		-696.76
	09/19/2023	13718	BETA Healthcare Group		-758.00
	09/19/2023	13719	Bianca Heyming		-64.45
	09/19/2023	13720	Bill Leach		-1,991.32
	09/19/2023	13721	Brand Assasins		-80.58
	09/19/2023	13722	CalPERS		-8,315.67
	09/19/2023	13723	Culligan of Escondido		-60.26
	09/19/2023	13724	Darren Key		-65.00
	09/19/2023	13725	Fallbrook Chamber of Commerce		-10.00
	09/19/2023	13726	Fowler Pest Control, Inc.		-246.00
	09/19/2023	13727	Juana Diaz		-910.00
	09/19/2023	13728	JW Mechanical		-7,982.50
	09/19/2023	13729	Katia Elizondo Marquez		-22.66
	09/19/2023	13730	Konica Minolta		-1,592.55
	09/19/2023	13731	LDC Always Green Landscape		-1,440.00
	09/19/2023	13732	Nigro & Nigro		-8,000.00
	09/19/2023	13733	North County Fire Protection District		-20,504.91
	09/19/2023	13734	Patty Taylor		-9.43
	09/19/2023	13735	Rachel Mason		-148.21
	09/19/2023	13736	SDRMA		-628.77
	09/19/2023	13737	UMPQUA Bank		-1,348.71
	09/26/2023	13738	VOID	Voided	0.00
	09/26/2023	13739	VOID	Voided	0.00
	09/26/2023	13740	Amazon Capital Services		-472.86
	09/26/2023	13741	Darren Key		-80.00
	09/26/2023	13742	FPUD - 7720-001		-322.49
	09/26/2023	13743	FPUD - 7720-002 - E. Mission Rd.		-52.09
	09/26/2023	13744	FPUD - 7720-003 - E. Mission Rd.		-304.13
	09/26/2023	13745	FPUD - 7721-000	7721-000	-52.09
	09/26/2023	13746	Impact Marketing & Design, Inc.		-468.98
	09/26/2023	13747	Jennifer Jeffries		-912.92
	09/26/2023	13748	Juana Diaz		-470.00
	09/26/2023	13749	Pitney Bowes - Lease		-77.29
	09/01/2023		GoDaddy	PREAUTHORIZED ACH DEBIT GO DADDY WEB ORDER 230901 14095796981409579698	-191.88
	09/05/2023		ADP, LLC	PREAUTHORIZED ACH DEBIT ADP - TAX ADP - TAX 230905 931229452080A0193122945 2080A01	-9,600.46

			PREAUTHORIZED ACH DEBIT ADP - TAX ADP - TAX 230905 931229452080A0193122945 2080A01	-9,600.46
09/05/2023	ADP, LLC		PREAUTHORIZED ACH DEBIT ADP WAGE PAY WAGE PAY 230905 706093928130ZQW70609392 8130ZQW	-23,941.36
			PREAUTHORIZED ACH DEBIT ADP WAGE PAY WAGE PAY 230905 706093928130ZQW70609392 8130ZQW	-23,941.36
09/06/2023	American Funds Investment		PREAUTHORIZED ACH DEBIT AMERICAN FUNDS INVESTMENT 230906 75403584 23090475403584 230904	-4,736.03
			PREAUTHORIZED ACH DEBIT AMERICAN FUNDS INVESTMENT 230906 75403584 23090475403584 230904	-1,896.09
			PREAUTHORIZED ACH DEBIT AMERICAN FUNDS INVESTMENT 230906 75403584 23090475403584 230904	-1,515.88
			PREAUTHORIZED ACH DEBIT AMERICAN FUNDS INVESTMENT 230906 75403584 23090475403584 230904	449.61
			PREAUTHORIZED ACH DEBIT AMERICAN FUNDS INVESTMENT 230906 75403584 23090475403584 230904	874.45
09/14/2023	Deluxe		PREAUTHORIZED ACH DEBIT Deluxe Small Bus EDI/ACH 230913 17082000509621170820005 09621	-362.12
			PREAUTHORIZED ACH DEBIT Deluxe Small Bus EDI/ACH 230913 17082000509621170820005 09621	362.12
09/15/2023	GoDaddy		PREAUTHORIZED ACH DEBIT GO DADDY WEB ORDER 230915 21396354572139635457	-191.88
			PREAUTHORIZED ACH DEBIT GO DADDY WEB ORDER 230915 21396354572139635457	191.88
09/15/2023	ADP, LLC		PREAUTHORIZED ACH DEBIT ADP PAYROLL FEES ADP FEES 230915 43756970172643756970172 6	-141.02
			PREAUTHORIZED ACH DEBIT ADP PAYROLL FEES ADP FEES 230915 43756970172643756970172 6	141.02
09/19/2023	ADP, LLC		PREAUTHORIZED ACH DEBIT ADP WAGE PAY WAGE PAY 230919 935028072421ZQW93502807 2421ZQW	-19,930.21
			PREAUTHORIZED ACH DEBIT ADP WAGE PAY WAGE PAY 230919 935028072421ZQW93502807 2421ZQW	-19,930.21
09/19/2023	ADP, LLC		PREAUTHORIZED ACH DEBIT ADP - TAX ADP - TAX 230919 497568691678A0149756869 1678A01	-8,035.70
			PREAUTHORIZED ACH DEBIT ADP - TAX ADP - TAX 230919 497568691678A0149756869 1678A01	-8,035.70
09/29/2023	ADP, LLC		PREAUTHORIZED ACH DEBIT ADP PAYROLL FEES ADP FEES 230929 38256966099538256966099 5	-122.21
			PREAUTHORIZED ACH DEBIT ADP PAYROLL FEES ADP FEES 230929 38256966099538256966099 5	122.21

Tuesday, Oct 24, 2023 02:36:34 PM GMT-7



UMPQUA BANK

BL ACCT 00002840-20000001
FALLBROOK REG HEALTH DIST
Account Number: ####-####-####-7117
Page 1 of 4



Account Summary

Table with 3 columns: Description, Sign, Amount. Includes Billing Cycle, Days In Billing Cycle, Previous Balance, Purchases, Cash, Balance Transfers, Special, Credits, Payments, Other Charges, Finance Charges.

NEW BALANCE \$5,618.91

Credit Summary

Table with 2 columns: Description, Amount. Includes Total Credit Line, Available Credit Line, Available Cash, Amount Over Credit Line, Amount Past Due, Disputed Amount.

Account Inquiries

- Call us at: (866) 777-9013
Lost or Stolen Card: (866) 839-3485
Go to www.umpquabank.com
Write us at PO BOX 35142 - LB1181, SEATTLE, WA 98124-5142

Payment Summary

Table with 2 columns: Description, Amount. Includes NEW BALANCE \$5,618.91, MINIMUM PAYMENT \$5,618.91, PAYMENT DUE DATE 10/25/2023.

NOTE: Grace period to avoid a finance charge on purchases, pay entire new balance by payment due date. Finance charge accrues on cash advances until paid and will be billed on your next statement.

Corporate Activity

Table with 5 columns: Trans Date, Post Date, Reference Number, Transaction Description, Amount. Includes TOTAL CORPORATE ACTIVITY \$1,328.58.

Cardholder Account Summary

Table with 5 columns: Cardholder Name, Payments & Other Credits, Purchases & Other Charges, Cash Advances, Total Activity. Includes LINDA BANNERMAN.

Cardholder Account Detail

Table with 6 columns: Trans Date, Post Date, Plan Name, Reference Number, Description, Amount. Includes ADOBE \*ACROPRO SUBS, WWW COSTCO COM, ACE PARTY RENTAL.

PLEASE DETACH COUPON AND RETURN PAYMENT USING THE ENCLOSED ENVELOPE - ALLOW UP TO 7 DAYS FOR RECEIPT

UMPQUA BANK
PO BOX 35142 - LB1181
SEATTLE WA 98124-5142



Account Number

####-####-####-7117

Check box to indicate name/address change on back of this coupon

AMOUNT OF PAYMENT ENCLOSED

Table with 4 columns: Closing Date, New Balance, Total Minimum Payment Due, Payment Due Date. Includes 09/29/23, \$5,618.91, \$5,618.91, 10/25/23.

\$



BL ACCT 00002840-20000001
FALLBROOK REG HEALTH DIST
138 SOUTH BRANDON ROAD
FALLBROOK CA 92028

MAKE CHECK PAYABLE TO:

UMPQUA BANK COMMERCIAL CARD OPS
PO BOX 35142 - LB1181
SEATTLE WA 98124-5142

09 0004 7117 0000 0000 00000000 00000000 0

Cardholder Account Detail Continued					
Trans Date	Post Date	Plan Name	Reference Number	Description	Amount
09/13	09/14	PPLN01	24332393257026137539733	ALLIE'S PARTY EQUIPMENT 760-5914314 CA	\$607.09
09/13	09/14	PPLN01	24204293256000173040730	FACEBK SAA8RR3H42 650-5434800 CA	\$35.00
09/14	09/14		74692163257107724913311	CREDIT VOUCHER NNA SERVICES LLC 800-876-6827 CA	\$25.11-
09/15	09/17	PPLN01	24231683258014000288492	CALPERS CVENT 916-795-3433 CA	\$499.00
09/19	09/20	PPLN01	24231683263837001050708	NORTHGATE MARKET #030 FALLBROOK CA	\$21.24
09/22	09/24	PPLN01	24431063266286786600057	FALLBROOK REFUSE 760-744-5615 CA	\$56.00
09/22	09/24	PPLN01	24692163265104545604836	WWW COSTCO COM 800-955-2292 WA	\$100.18
09/23	09/24	PPLN01	24204293266000147933521	FACEBK YZZERS3J42 650-5434800 CA	\$50.00
09/27	09/28	PPLN01	24906413270183614832530	EIG*CONSTANTCONTACT.COM 855-2295506 MA	\$110.00
09/27	09/28	PPLN01	24999893270900016300027	MANOR DRY CLEANERS INC FALLBROOK CA	\$48.00

Cardholder Account Summary					
RACHEL MASON ##### 2600		Payments & Other Credits \$0.00	Purchases & Other Charges \$2,967.30	Cash Advances \$0.00	Total Activity \$2,967.30

Cardholder Account Detail					
Trans Date	Post Date	Plan Name	Reference Number	Description	Amount
08/31	09/01	PPLN01	24427333243740289285841	MCDONALD'S F5458 SAN DIEGO CA	\$10.01
08/27	09/03	PPLN01	24692163244100574114503	MARRIOTT MONTEREY BAY MONTEREY CA	\$848.12
09/01	09/03	PPLN01	24492153244719613345613	UBER TRIP HELP.UBER.COM CA	\$70.01
08/31	09/03	PPLN01	24692163244100421274112	TST* Rosines Restaurant Monterey CA	\$74.10
08/31	09/03	PPLN01	24034543244000077693278	82518 - ALADDIN AIRPORT P SAN DIEGO CA	\$112.00
09/13	09/13	PPLN01	24492153256743561018621	UBER TRIP HELP.UBER.COM CA	\$107.06
09/12	09/14	PPLN01	24000973256413201061896	SANDYS PUB AT EVERLINE 530-4127034 CA	\$90.85
09/13	09/15	PPLN01	24000973257418300226638	CASCADES AT EVERLINE 530-4127034 CA	\$140.02
09/13	09/15	PPLN01	24000973257418300236025	SANDYS PUB AT EVERLINE 530-4127034 CA	\$84.42
09/15	09/17	PPLN01	24492153258717038967014	UBER TRIP HELP.UBER.COM CA	\$154.76
09/15	09/17	PPLN01	24540453259204700604030	MARICHUYS MEXICAN KIT 775-2876391 NV	\$40.64
09/14	09/17	PPLN01	24000973258421407999007	SIX PEAKS GRILL AT EVE 530-4127034 CA	\$212.69
09/15	09/17	PPLN01	24034543259001716429829	82518 - ALADDIN AIRPORT P SAN DIEGO CA	\$92.00
09/15	09/18	PPLN01	24000973260428302867375	EVERLINE RESORT & SPA OLYMPIC VALLE CA	\$841.86
09/26	09/28	PPLN01	24129423270100000635707	MAJOR MARKET FALLBROOK CA	\$88.76

Cardholder Account Summary					
THERESA GERACITANO ##### 9073		Payments & Other Credits \$0.00	Purchases & Other Charges \$726.55	Cash Advances \$0.00	Total Activity \$726.55

Cardholder Account Detail					
Trans Date	Post Date	Plan Name	Reference Number	Description	Amount
09/08	09/10	PPLN01	24445003252000937340448	DOLLAR TREE FALLBROOK CA	\$14.82
09/08	09/11	PPLN01	24000973253392703372303	EVERLINE RESORT & SPA OLYMPIC VALLE CA	\$561.24
09/13	09/14	PPLN01	24011343256000050378480	CALENDLY HTTPSCALENDLY GA	\$15.00
09/15	09/17	PPLN01	24034543259001716429837	82518 - ALADDIN AIRPORT P SAN DIEGO CA	\$92.00
09/20	09/21	PPLN01	24231683264837001038645	NORTHGATE MARKET #030 FALLBROOK CA	\$43.49

Finance Charge Summary / Plan Level Information									
Plan Name	Plan Description	FCM <sup>1</sup>	Average Daily Balance	Periodic Rate *	Corresponding APR	Finance Charges	Effective APR Fees **	Effective APR	Ending Balance
<b>Purchases</b>									
PPLN01 001	PURCHASE	E	\$1,152.29	0.06024%(D)	21.9900%	\$20.13	\$0.00	21.9875%	\$5,618.91
<b>Cash</b>									
CPLN01 001	CASH	A	\$0.00	0.06572%(D)	23.9900%	\$0.00	\$0.00	0.0000%	\$0.00
* Periodic Rate (M)=Monthly (D)=Daily							Days In Billing Cycle: 29		
** includes cash advance and foreign currency fees							APR = Annual Percentage Rate		
<sup>1</sup> FCM = Finance Charge Method									
(V) = Variable Rate If you have a variable rate account the periodic rate and Annual Percentage Rate (APR) may vary.									

# Fallbrook Regional Health District

## Report #9 - Community Development Disbursements

July - September, 2023

DATE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT
<b>Wellness Center</b>					
07/14/2023	22448	Brand Assasins		Office Expenses:Maintenance & Repairs	2,478.00
08/06/2023	EST224	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	3,450.00
08/06/2023	EST223	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	5,800.00
08/06/2023	EST222	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	2,800.00
08/06/2023	EST221	JK Drywall and Construction		E. Mission Road:E. Mission Road - Improvements	6,200.00
08/08/2023	166962042	Uline		Office Expenses:Office Supplies	2,316.71
08/09/2023	MASON2	Langdon Floorcovering		E. Mission Road:E. Mission Road - Improvements	7,000.00
08/16/2023	23336	Fallbrook Rooter & Drain Service		Office Expenses:Maintenance & Repairs	612.44
08/23/2023	167560567	Uline		Office Expenses:Office Equipment & Fixtures	3,718.50
09/06/2023	Prop# 16369623	JW Mechanical		E. Mission Road:E. Mission Road - Improvements	7,982.50
09/28/2023	169058645	Uline	Chairs Utility Wagon	Office Expenses:Office Equipment & Fixtures	1,245.04
<b>Total for Wellness Center</b>					<b>\$43,603.19</b>



## Board Report Wellness Center Administrator Report- November 2023

### Community Health & Wellness Center:

- The District was visible at several outreach events in October: Bonsall Chamber Fall Festival, Fallbrook Chamber Harvest Festival, FUESD Trunk or Treat, presentation to MAAC parents, Bonsall Elementary School ELAC meeting, FUESD Health & Wellness Fair, Be There San Diego Summit presentation.
- Palomar Family Counseling office hours have started, and we can see activity from day one with adults and families coming for appointments.
- A Holiday Event is planned to thank educators who have provided support groups, activities, and education for our events on December 8.
- Parents' Guide to Safety event had a good turnout for the Spanish class.
- Discussions under way to help support the County's efforts in COVID testing and surveillance for the flu season at the Wellness Center.

<b>Wellness Center Events 2023</b>	<b>JAN</b>	<b>FEB</b>	<b>MAR</b>	<b>APRIL</b>	<b>MAY</b>	<b>JUNE</b>	<b>JULY</b>	<b>AUG</b>	<b>SEPT</b>
Mental Health First Aid	13		9	19	13	15	20		19
CCHW	14		21	21	13	13	12	19	18
Wellness Wednesday- Health Screening, workshop, resources	28	8	9	7	17	36	25	25	300 inc. Eye on health
Cultivate Health Workshops	10	2	14	9	2	2	9	9	
DPP / Lifestyle Change Program				17	63	55	60	56	40
Partner Health & Wellness activities	107	138	223	298	234	204	205	180	142
Support Groups	53	73	55	63	92	83	72	93	64
Michelle's Place office hours	32	43	74	32	51	50	41	55	51
Yoga	232	233	302	257	269	261	217	236	276
Foundation for Senior Care- Fix It Fridays/Computer Classes	24	61	20	10	10	11	15	16	15
Blood Drive with San Diego Blood Bank	24		24		19			25	
COVID-19 PCR Testing	29	17							
Club/ Organizational meetings	181	203	205	179	136	195	83	260	172
Youth Activity					9	63	60	19	
Tours/Chamber Activities	7	3	7	3	11	4	6	3	38
<b>Total Wellness Center Visits (approximate)</b>	<b>754</b>	<b>781</b>	<b>963</b>	<b>915</b>	<b>939</b>	<b>992</b>	<b>825</b>	<b>996</b>	<b>1135</b>
Rental Events Visits- Private or class	105	0	0	8	5	0	0	0	0

<b>Number of Events 2023</b>	<b>JAN</b>	<b>FEB</b>	<b>MAR</b>	<b>APR</b>	<b>MAY</b>	<b>JUNE</b>	<b>JULY</b>	<b>AUG</b>	<b>SEPT</b>
Private events	9	14	19	17	19	27	19	21	23
Public Events	63	76	61	71	87	66	66	73	80
<b>Total Events</b>	<b>72</b>	<b>90</b>	<b>80</b>	<b>88</b>	<b>106</b>	<b>93</b>	<b>85</b>	<b>94</b>	<b>103</b>
Events held by Grantees	6	27	16	11	16	18	16	13	19
Private Health Event/Rental	0	1	1	1	0	0	0	0	0

**Flyer Distribution:**

- Printed and digital flyers continue to be distributed as discussed in previous reports.

**Marketing:**

**Press (Village News):**

- Press Release: 10/18/23 “At-home COVID-19 testing kits can be ordered”
- Events listed in Community Calendar

**Email Marketing & Constant Contact Overview:**

EMAIL MARKETING 2023	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT
<b>Total Contacts</b>	3883	3943	4013	4034	4067	4,166	4214	4,224	4,304
<b>New Contacts Added</b>	105	72	108	69	77	100	89	50	139
<b>Net New Contacts</b>		41	77	33	60	80	48	10	76
<b>Number of emails sent</b>	6,071	8,077	12,636	17,864	4,626	9,153	14,843	13,387	28,811
<b>Number of emails opened</b>	2,873	3806	5581	8,659	2148	4,316	6815	6,558	13,185
<b>Open rate</b>	52%	52%	48%	53%	51%	52%	50%	54%	50%
<b>Open rate over industry average</b>	16%	17%	13%	19%	17%	18%	14%	20%	16%
<b># of Clicks</b>	208	230	203	263	150	338	253	294	482
<b>Click rate</b>	4%	3%	4%	3%	7%	8%	4%	4%	4%
<b>Click rate over industry average</b>	1%	0	-3%	-2%	2%	3%	0%	-1%	-1%

- Sign ups for our newsletter are gathered at all community events and continue to help us grow our email distribution list.

## CHIEF EXECUTIVE OFFICER'S REPORT - OCTOBER

### Community Health & Wellness Center:

- Facility construction updates
  - HVAC for Bldg A-room2 has been reviewed and will be installed within a few weeks. We are still reviewing the design option to get Room 1 on line.
  - I met with Scott Harry of Karn Engineering to pursue the design of two ADA compliant ramps that would allow access from Bldg A to Bldg B, and from the main parking area down to the shade structure. All of these quotes will be brought forward to the Facilities committee for review.
  - I have two pending meetings with architects to review the ADA design needs of Bldg C (the house), as well as the renovation needs for Bldg-B rooms 3-6 and the restrooms in that building.
- The lease agreement with the Communications tower provider was reviewed by Jeff. After some negotiations Public Safety Towers (PST) is reviewing our counter. I'm still waiting for their proposal to take the next Facilities Committee
- I am still waiting for details regarding services and rotation schedule from Gary & Mary West PACE. Will bring these back to Strategic Planning committee once we have a more detailed proposal.

### Community Partnerships:

- Palomar Family Counseling Service has been providing mental health services at the Center! Launching on Oct 3<sup>rd</sup>, we're going to let their team get settled before we schedule a Chamber of Commerce Ribbon Cutting, run press releases in the Newspaper, and hold an open house to see space. We are excited that PFCS has also been able to offer an expanded service because they also have a Spanish speaking intern who will onsite as well.
- We are still outlining a new MOU with the Fallbrook Food Pantry, but have created space for their garden plot space outside of Building C- House. This project will be part of their Nutrition to Grow On and Diabetes education programs.

### Community Meetings:

- 10.11, I held a zoom meeting with the CEO's at Grossmont (Christian Wallis) and Tru-City (Gene Ma) to discuss their conversations with LAFCO.
- 10.23, the four area Health District CEO's held a zoom meeting with the LAFCO team to discuss the upcoming MSR focus and process. Again, they are planning to focus on the holistic nature of healthcare provision, potential collaborations, and ways where Districts can be more integrated into their communities. Our focus on preventative and health promotion programming will be our main topic of discussion. My plan is to reach out to a few of our partners to help create a stakeholder group for LAFCO.
- Tri-City Health District voted to pursue an affiliation with UC San Diego, we will continue our discussions with them regarding the provision of clinical services in our area.

**Administrative Projects:**

- FY22.23 Annual Report – I anticipate having this completed before the end of the month. It is in final edit mode.
- Still in progress – our Updated FRHD District Polic Manual: this project will ensure that our policies are current and inline with our actual operations and not referenced back to the hospital. This will also include policies for employee driving or District vehicles, email and social media polices, and several other policies that get us in compliance with many HR best practices.
- Still in progress for the FY24.25: Ongoing grant protocols and procedures – process will move to committees for expanded conversation:
  - Grant to revenue proportion – Finance Committee
  - Expectations of service provision – Strategic Planning
  - Moving regular partnered programming from grants to MOUs – Strategic Planning
    - Michelle's Place

## Organization Information

### Legal Name

Boys Club of Fallbrook

### DBA (if Applicable)

Boys & Girls Clubs of North County

## Program Name/Title

Summer Water Safety

## Brief Program Description

The Summer Water Safety Program is held during the 10 weeks of summer break and consists of swimming lessons and a water safety program. Lessons are taught by certified lifeguards, with water safety included. Water safety is also provided to youth in our daily open swim program. The open swim program is monitored by certified lifeguards.

## Funding Amount Awarded

17225.00

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	97	500
Young Adults (13-17)	3	16
Adults (18-60)	0	0
Seniors (60+)	0	0
We do not collect this data (indicate with 100%)*	0	0

## Target Population not collected - Age

n/a

## Target Population - Gender

	Percent of program participants
Female	49
Male	51
Non-binary	0
Unknown*	0

## \*Target Population - Gender

n/a

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	40
Very Low (50%) Income Limits, ceiling of \$53,500	40
Low (80%) Income Limits, ceiling of \$85,600	15
Higher Than Listed Limits	5
We do not collect this data (indicate with 100%)*	0

## \*Target Population - Income Level

n/a

## Actual number of residents that directly benefited (participant/client) from this program during this quarter.

516

## Program/Services Description - Social Determinants of Health

Education Access & Quality (Early Childhood Education and Development, Enrollment in Higher Education, High School Graduation, Language and Literacy)

Social & Community Context (Civic Participation, Discrimination, Incarceration, Social Cohesion)

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

Neighborhood & Built Environment (Access to Foods that Support Healthy Eating Patterns, Crime and Violence, Environmental Conditions, Quality of Housing)

## Program Goal & Objectives

To improve the overall health of the youth members of the Boys & Girls Clubs of North County, specifically working to prevent drowning, diabetes, obesity, high cholesterol, high blood pressure, hypertension and increasing social supports. 1. Provide daily swimming lessons and water safety instruction to 150 youth during the swim season. 2. Provide open swim time for approximately 50 youth per day including structured activities and water safety instruction.

## Program Outcomes & Measurables

Daily roll sheets and participation counts will be kept. Any child needing an assist or rescue during open swim will be given swim lessons free of charge.

## Anticipated Acknowledgment

Social Media Postings

Print Materials to Service Recipients

Website Display

## Terms and Conditions

Accepted

**Authorized Signature**

*John Doe*

## Contact Information

### Contact Name

lisa ware

### Title

Vice Pres. of Operations

### Primary Contact Phone

7607285871

### Email Address

lisaw@bgcnorthcounty.org

## Writing Instructions:

What language(s) does this program accommodate:

English

Spanish

## Acknowledgment of District Support



Swim recognition final.pdf

## Impact Story



swim impact 23.pdf

## Program Budget



Budget Report.Water Safety.Q1.pdf



## 2023 Pool Impact Narrative

Antonio, his brother, and their mother are newcomers to our community. They immigrated to Fallbrook from Colombia in the middle of last school year- Antonio's family only spoke Spanish, and Antonio was completely non-verbal. Antonio's new school reached out to our organization for help because he was struggling before, during, and after school, both academically and socially. He was prone to volatile emotional outbursts and had a very hard time connecting with other people.

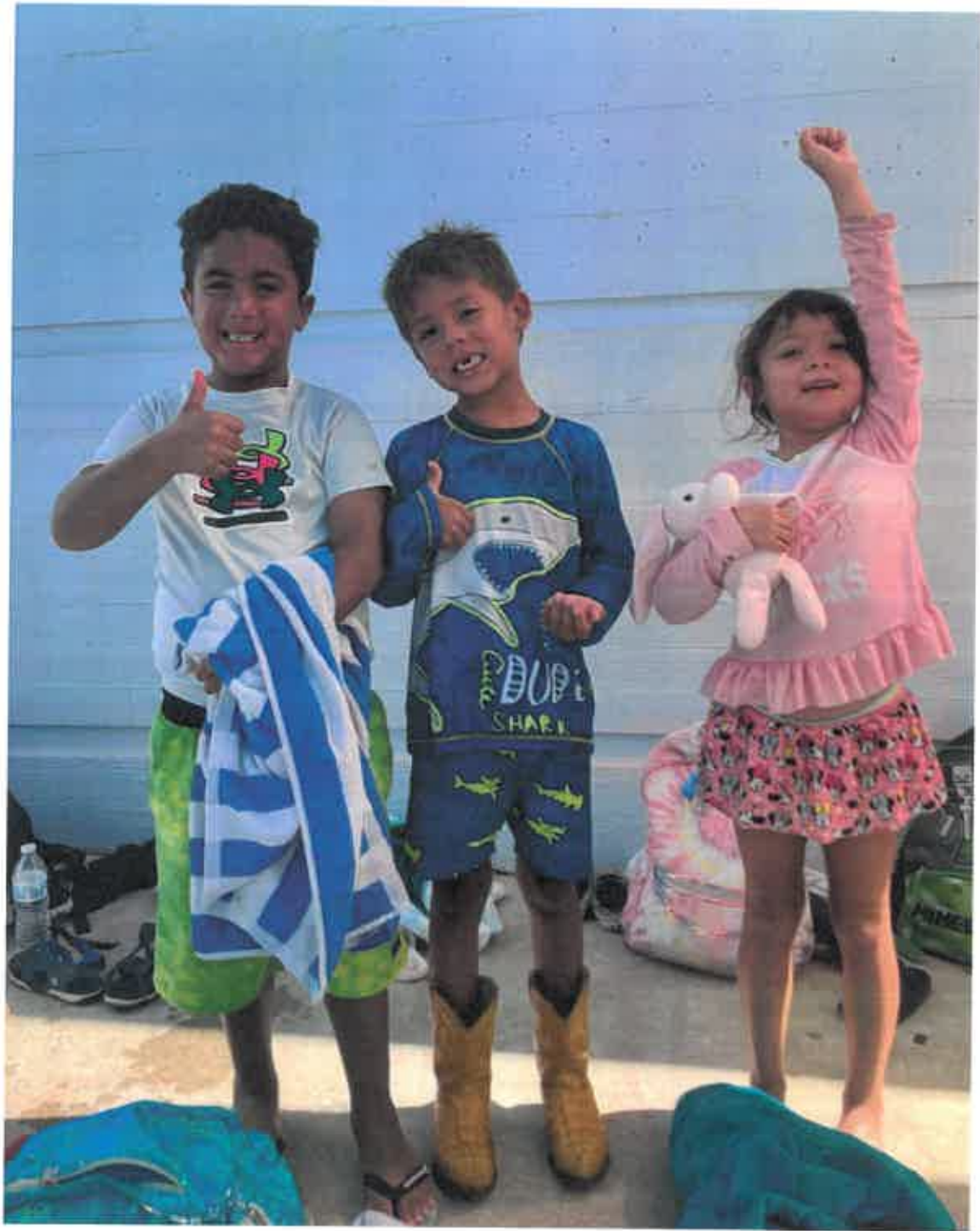
Antonio started his summer by attending summer school during the morning and recreational swim in the afternoon. He had absolutely no experience in a pool prior to this June, and he taught himself how to walk around in the shallow end and how to put his face into the water.

In July, Antonio started swim lessons. His brother Ale had learned from his peers how to pass the deep end test, and Antonio wanted to catch up to him. Antonio could learn by listening to our Spanish-speaking lifeguards and by watching demonstrations- thus, he caught on quickly and improved rapidly. He excelled at the sport, and his confidence grew exponentially with each lesson. In one month, Antonio went from a level 1 beginner to a level 4 swimmer!

The water is soothing to the senses, and as long as he eats snack, he can successfully swim for 3 hours during recreational swim time each afternoon. His emotional outbursts were half as frequent as before the pool opened, and he started making friends. He has learned to say a few words in Spanish and English (si, no, and splash), and he and the pool staff communicated using a blend of made-up sign language and Spanish.

We are so glad that Antonio became a member of the Boys & Girls Clubs of North County. It has been a joy to watch him flourish in our program, and his growth has been an inspiration to us all.





## Lisa Ware

**From:** Meredith Anderson  
**Sent:** Monday, August 21, 2023 10:28 AM  
**To:** Maureen Sullivan; Allison Barclay; Lisa Ware  
**Subject:**



**Fallbrook Regional Health District is with Boys & Girls Clubs of North County.**

Top contributor · 2m · 🌐

...

The Fallbrook Regional Health District's CEO - Rachel Manson & Board of Directors - Mike Stanicek & Terry Brown visited the Boys & Girls Clubs of North County 🏡👨👩 earlier this month. During this visit, they toured the property & learned about all the fantastic services the Boys & Girls Clubs of North County are providing to local surrounding families during the summer ☀️ & new school year 🎒.

During the summer break, Fallbrook Regional Health District sponsored the Boys & Girls Clubs of North County's Summer Water Safety Program. With this partnership, we were able to help the kids have a fun & safe swim program. 🌊

A big thank you to Ashley Barclay & Lisa Ware for the tour and we look forward to continuing this wonderful partnership we have together! 💙

#northcounty #falbrook #sandiegocounty #community #localgovernment #frhd #HealthDistrict #support #families #boysandgirlsclubofamerica #bgcnorthcounty #grants #funding #summer #familyfun #safety #youth #sandiego





**Boys & Girls Clubs of North County**

Published by Meredith Anderson · July 13 at 9:30 AM ·



Thank you, [Fallbrook Regional Health District](#), for a wonderful partnership and helping our kids have fun & stay safe this summer!



Your Local Club News - Summer 2023



BGC of North County <allisonb+bgcnorthcounty.org@ccsend.com>  
To Meredith Anderson



Reply

Reply All

Forward



Fri 7/28/2023 11:02 AM

If there are problems with how this message is displayed, click here to view it in a web browser.



Boys & Girls Clubs of North County

# CLUB

OPENING THE DOOR TO GREAT FUTURES EVERY DAY

Summer 2023



### Summer at the Club

It's a busy summer at the Club! Now that June gloom is a memory, Club kids are enjoying the pool for swim lessons, swim team, and afternoon free swim.

Our partnerships with many local organizations are offering much-needed support and enrichment for our Club members. Fallbrook Regional Health District helps sponsor our Water Safety Program, helping educate our Club members on how to safely save someone experiencing distress in the water. Club members also learn how to save themselves from drowning.



Our partnership with Cal State

## Organization Information

### Legal Name

Boys Club of Fallbrook

### DBA (if Applicable)

Boys & Girls Clubs of North County

## Program Name/Title

Triple Play Program

## Brief Program Description

Triple Play: A Game Plan for the mind, body and soul is a proven health and wellness program developed by Boys & Girls Clubs of America. It's 3 components teach youth Healthy Habits, provide daily physical challenges and social recreation for social and emotional development.

## Funding Amount Awarded

40033.00

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	91	1078
Young Adults (13-17)	8.5	99
Adults (18-60)	.5	3
Seniors (60+)	0	0
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

n/a

## Target Population - Gender

	Percent of program participants
Female	49
Male	51
Non-binary	0
Unknown*	0

## \*Target Population - Gender

n/a

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	35
Very Low (50%) Income Limits, ceiling of \$53,500	38
Low (80%) Income Limits, ceiling of \$85,600	15
Higher Than Listed Limits	12
We do not collect this data (indicate with 100%)*	0

## \*Target Population - Income Level

n/a

## Actual number of residents that directly benefited (participant/client) from this program during this quarter.

1180

## Program/Services Description - Social Determinants of Health

Economic Stability (Employment, Food Insecurity, Housing Instability, Poverty)

Education Access & Quality (Early Childhood Education and Development, Enrollment in Higher Education, High School Graduation, Language and Literacy)

Social & Community Context (Civic Participation, Discrimination, Incarceration, Social Cohesion)

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

Neighborhood & Built Environment (Access to Foods that Support Healthy Eating Patterns, Crime and Violence, Environmental Conditions, Quality of Housing)

## Program Goal & Objectives

To improve the overall health of youth members of the Boys & Girls Clubs of North County, specifically working to prevent obesity and diabetes, high blood pressure, and hypertension. As well as increase social supports for youth and families, healthy food/nutrition education and health literacy. Our objectives to serve the goal are 1. Hire and train staff to provide the Triple Play Program at each site. 2. Provide 60 minutes of vigorous physical activity each day at every site reaching over 400 members each day. 3. Provide 3 family nights each year for our members and their families.

## Program Outcomes & Measurables

1. We will keep hiring and training logs for each site.
2. Staff members will track participation on roll sheets. Every spring members over the age of 9 will complete a survey the results of which will help us track other daily healthy habits.
3. Participation counts and other documentation will be kept on the family nights.

## Anticipated Acknowledgment

Social Media Postings

Print Materials to Service Recipients

Website Display

**Terms and Conditions**

Accepted

**Authorized Signature**

*John Ware*



## Contact Information

### Contact Name

lisa ware

### Title

Vice Pres. of Operations

### Primary Contact Phone

7607285871

### Email Address

lisaw@bgcnorthcounty.org

## Writing Instructions:

**What language(s) does this program accommodate:**

English

Spanish

## Acknowledgment of District Support



Triple play q1 23.pdf

## Impact Story



triple Play impact q1 23.pdf

## Program Budget



Budget Report.Triple Play.Q1.pdf

When these programs are combined with caring Club professionals, we get stories like Elsita and Araceli's, two immigrant sisters. Elsita and Araceli are deaf and hard of hearing, they can sign but cannot speak nor read and write. Their mother only speaks Spanish and found it difficult to navigate our community for additional resources to help her daughters. After joining our Club, Spanish speaking staff helped their mother find community resources. Several staff know ASL and were able to sign with the girls helping them to communicate. ASL posters were placed in all Clubhouse rooms and soon Club members were learning to sign with Elsita and Araceli. Both girls love swimming and staff modified swimming procedures to allow them to safely use the pool. Both girls definitively blossomed out of their shells this summer





Boys & Girls Clubs of North County

# CLUB NEWS

OPENING THE DOOR TO GREAT FUTURES EVERY DAY

Summer 2023



## Summer at the Club

It's a busy summer at the Club! Now that June gloom is a memory, Club kids are enjoying the pool for swim lessons, swim team, and afternoon free swim.

Our partnerships with many local organizations are offering much-needed support and enrichment for our Club members. Fallbrook Regional Health District helps sponsor our Water Safety Program, helping educate our Club members on how to safely save someone experiencing distress in the water. Club members also learn how to save themselves from drowning.



Our partnership with Cal State San Marcos Nursing Students provides nurses to take care of our kids, and many of our Club



**Boys & Girls Clubs of North County**

August 1 at 10:12 AM · 🌐



TUE, AUG 8

**Blood Drive with the San Diego Blood Bank**

Fallbrook

You like Fallbrook Regional Health District

☆ Interested

[See insights](#)

[Boost post](#)



**Boys & Girls Clubs of North County**

Published by Meredith Anderson • September 12 at 11:43 AM • 🌐



**SAT. SEP 30 AT 9 AM**

### Eye on Health Youth Festival

Fallbrook Regional Health District

1 person going

☆ Interested

See insights

Boost post

👤 3

👍 Like

💬 Comment

➦ Share



Write a comment...



## Organization Information

### Legal Name

Community Health Systems, Inc.

### DBA (if Applicable)

Community Health Systems, Inc.

## Program Name/Title

SBHC BH Expanded Services Program

## Brief Program Description

The vision of the School District is to provide health services to middle school children exhibiting social and/or behavioral deficits. CHSI's SBHC on-site at Potter JHS will provide essential behavioral health services through its clinicians which will develop trust among school personnel, educators, clinicians, and students to support their vision.

## Funding Amount Awarded

30000

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	13	3
Young Adults (13-17)	87	20
Adults (18-60)		
Seniors (60+)		
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

N/A

## Target Population - Gender

	Percent of program participants
Female	74
Male	26
Non-binary	
Unknown*	

## \*Target Population - Gender

N/A

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	70
Very Low (50%) Income Limits, ceiling of \$53,500	15
Low (80%) Income Limits, ceiling of \$85,600	15
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	

### \*Target Population - Income Level

N/A

### Actual number of residents that directly benefited (participant/client) from this program during this quarter.

23

## Program/Services Description - Social Determinants of Health

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

### Program Goal & Objectives

Goal:

By partnering with CHSI, the goal of the Fallbrook Union Elementary School District and Potter JHS, is to provide resources and community outreach in an expanded format on campus to raise awareness, reduce and/or eliminate stigmas, and provide transparent support for behavioral health. Students and their family members have reassurance in knowing that confidential services will be provided in a safe and culturally appropriate manner. CHSI has demonstrated its commitment and capacity to serve the community by documenting a steady increase in utilization of services provided to underserved patients.

Objectives:

1. By the end of the program year, or June 30, 2024, CHSI will have expanded its SBHC services to five (5) days per week.

Quarter 1 Update: As of September 30, 2023, this objective is still in progress.

2. By the end of the program year, or June 30, 2024, CHSI will have provided 150 visits to uninsured students from Potter JHS.

Quarter 1 Update: From July 1 to September 30, 2023, CHSI has provided 71 visits to uninsured/underserved patients.

### Program Outcomes & Measurables

1. Currently, CHSI is providing behavioral health services at Potter JHS on a part-time basis at three (3) days per week, with projected expansion to full-time as demand progresses. Continued outreach and collaboration with CHSI's Community Relations team and the school district, combined with the on-site presence of behavioral health providers will increase awareness and education of the importance of mental/behavioral health support to students and their family members. CHSI's anticipated expansion to

five (5) days per week will be determined by data evaluation through its practice management system (how many patients are scheduled, and the need for additional appointment slots).

2. CHSI has estimated that approximately 50% of the SBHC's referrals to FFHC are patients who have health insurance coverage by plans not covered by FFHC. In order to maintain continuity of care and ensure that no patient is turned away, CHSI is proposing to cover the cost of 150 visits for students needing services, since there may be multiple visits needed for each individual.

### **Anticipated Acknowledgment**

Signage at Service Sites

### **Terms and Conditions**

Accepted

### **Authorized Signature**

A handwritten signature in black ink, appearing to read "JKL" followed by a flourish.



## Contact Information

### Contact Name

Naureen Khan

### Title

Director of Grants Management

### Primary Contact Phone

(949) 697-8814

### Email Address

n.khan@chsica.org

## Writing Instructions:

**What language(s) does this program accommodate:**

English

Spanish

## Acknowledgment of District Support



Potter BH Enrollment Flyer (6).pdf

## Impact Story



Quarter 1 Patient Impact Sto... .pdf

## Program Budget



23\_24 FRHD CHC Program B....xlsx

CHSI's SBHC BH Expanded Services Program

Impact Story – Quarter 1: July – September 2023

Below is an impact story CHSI's Behavioral Health Coordinator received from a parent of a patient at Potter Junior High School's School-Based Health Center who is seen on a weekly basis. As the parent mentioned, funding from FRHD's support from this program allowed the student to have more frequent therapy sessions and make a positive impact on the student's behavioral health progress.

"To whom it may concern,

I am writing this email in regard to how much improvement my son John Adams **[patient name changed for HIPAA compliance]** has shown since starting his therapy with this program. John has always struggled with emotion regulation and processing his own emotions. It has in turn led to a lot of phone calls from the school, frustration, and overall not knowing how to help him. I did advocate and get John a 504b plan in 3rd grade but that only goes so far. Last year was John's 7th grade year and we felt a fresh start. He had been labeled "that kid" in elementary school and we were optimistically going into middle school. Unfortunately it didn't go that way. Although we had John in therapy outside of school he could only get [appointments] once every 2 months and it was not helping him. Not to mention he wasn't always honest with them. My son struggles with how to communicate when he gets angry and quite a few times it's come out with him saying, "I want to kill myself." Or "I'm going to go kill myself." my son uses self-harm to also deal with conflict that is happening. Recently though he went through an event where 2 of his peers that states they are friends with him destroyed his property at school. [It was] his folder that he uses every day. His paperwork was strewn everywhere and his ADHD was kicked into high gear. The adults around him didn't take notice that he was not at his baseline and very emotional. So John did what he's been taught in his therapy sessions. Coping skills. He told me and the VP that although he was very upset he went through the 5 stages of grief. Ultimately coming to acceptance that it was what it was and he could get another folder. The VP, Ms. Apple **[name changed for privacy]** and I were shocked. Most adults can't even rationalize that way. I know this is something he has been taught in his therapy sessions and he's finally using what has been worked on. I can't thank your program enough for giving John the tools he needs to be successful in his emotional life and helping him moving forward."



# Potter Junior High School Behavioral Health Center

## We're Accepting New Patients!

### Most Common Visits:

- Depression
- Anxiety
- Stress
- Anger
- Coping Strategies
- Loss and Grief
- Trauma

### We Accept Most Health Insurances

- Medi-Cal
- Private Insurance
- HMOs
- PPOs

### Sliding-Fee Program Available to All

- Services at discounted rates are provided to those who qualify.
- Based on family size and income only.
- A nominal fee applies.

### Contact Us:



(760) 451-4741



[www.chsica.org](http://www.chsica.org)





# Centro de Salud Mental de Potter Junior High School

## ¡Estamos Aceptando Nuevos Pacientes!

### Visitas Más Comunes:

- Depresión
- Ansiedad
- Estrés
- Enojo
- Estrategias de Afrontamiento
- Pérdida y Duelo
- Trauma

### Aceptamos la Mayoría de los Seguros de Salud

- Medi-Cal
- Aseguranza Privada
- HMOs
- PPOs

### Escala de Descuento Disponible para Todos

- El descuento se proporciona a quienes califican
- Basado al tamaño de la familia e ingreso
- Tarifa nominal aplica

### Contáctenos



(760) 451-4741



[www.chsica.org](http://www.chsica.org)



## Organization Information

### Legal Name

Community Health Systems, Inc.

### DBA (if Applicable)

Community Health Systems, Inc.

## Program Name/Title

Wellness, Health, Education, & Empowerment for Life (WHEEL) Program

## Brief Program Description

CHSI is proposing to initiate the Wellness, Health, Education, & Empowerment for Life (WHEEL) Program that will provide teens with the appropriate education and tools necessary to navigate through the social, emotional, and physical challenges they face in their everyday lives relating to health, wellness, and safety.

## Funding Amount Awarded

30000

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)		
Young Adults (13-17)	100	23
Adults (18-60)		
Seniors (60+)		
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

N/A

## Target Population - Gender

	Percent of program participants
Female	70
Male	30
Non-binary	
Unknown*	

## \*Target Population - Gender

N/A

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	
Very Low (50%) Income Limits, ceiling of \$53,500	
Low (80%) Income Limits, ceiling of \$85,600	
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	100

### \*Target Population - Income Level

N/A All teens - Income level may be important for factors relating to referrals to resources in the community that address a certain need in which participants may need assistance with. However, the WHEEL Program is open to all teens from all levels of income. Therefore, CHSI will not collect and/or report on information relating to income for this program.

### Actual number of residents that directly benefited (participant/client) from this program during this quarter.

23

### Program/Services Description - Social Determinants of Health

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

Neighborhood & Built Environment (Access to Foods that Support Healthy Eating Patterns, Crime and Violence, Environmental Conditions, Quality of Housing)

### Program Goal & Objectives

Goal:

The WHEEL Program has been established to educate adolescents on various health and wellness subjects, and to create awareness of high-risk situations and empower them with the tools necessary to prevent them.

Objectives:

1. By the end of each workshop, 80% of teen participants will be able to recognize risk factors and behaviors that may negatively influence their health.

2. By June 30, 2024, at least 45 teen participants will have been referred to resources in the community that are appropriate to their needs.

3. By June 30, 2024, at least 67 teen participants will have completed at least one full cohort of the WHEEL program.

### **Program Outcomes & Measurables**

1. Program facilitators will assess the teen participants' understanding of the education provided at the end of each workshop when the questions and answers session of the workshop is in progress.

2. Teen participants will be connected and/or referred to appropriate resources relating to their needs. This may be determined based on the questions asked in the group setting as well as by any assistance teens seek immediately following an educational workshop, or any other time throughout the 6 week period of the cohort. Referrals and connection to resources may also be made to teens in discretion if appropriate. Program facilitators will keep a log of all of the types of referrals made during or outside of workshop hours in order to aid in assessing impact of the program. CHSI's aims to have an outcome of at least half, or 45, of program participants referred and/or connected to resources appropriate to their needs.

3. CHSI will use a sign-in sheet to document how many teens participate in each workshop throughout each cohort, ensuring to keep a calculated measure of impact of the program. Sign-in sheets will help program facilitators keep track of retention rate. Retention rate will be determined based on how many teens complete one full cohort from beginning to end. CHSI expects a retention rate of at least 75% of all program participants. CHSI will also keep a log of how many teen participants become Teen Ambassadors, by completing cohorts 1 & 2, for the program.

### **Anticipated Acknowledgment**

Signage at Service Sites

### **Terms and Conditions**

Accepted

### **Authorized Signature**



## Contact Information

### Contact Name

Naureen Khan

### Title

Director of Grants Management

### Primary Contact Phone

(949) 697-8814

### Email Address

n.khan@chsica.org

## Writing Instructions:

**What language(s) does this program accommodate:**

English

Spanish

## Acknowledgment of District Support



FLB Teen Wellness Worksho... .pdf

## Impact Story



Quarter 1 Participant Impact ... .pdf

## Program Budget

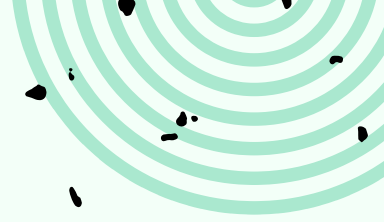


23\_24 FRHD CHC Program B...xlsx





COMMUNITY  
HEALTH  
SYSTEMS, INC.



# Teen Wellness Program

JOIN US!

## 6 CLASSES, TOPICS WILL INCLUDE:

1. Introduction and HIPAA
2. Drug Awareness and Prevention
3. Mental Health Awareness, Nutrition, and Physical Activity
4. Family Planning and Sexually Transmitted Infections (STIs) Awareness
5. Healthy Relationships & Digital Wellness
6. Life Skills and Future Planning to include Community Engagement and Giving Back



Raffle prize!  
Refreshments

Every Wednesday  
Starting August 30th  
From: 3:30 pm - 4:30 pm

## LOCATION:

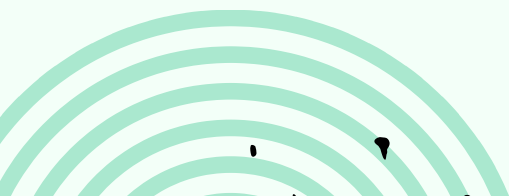
Fallbrook Family Health Center  
1328 South Mission Rd,  
Fallbrook CA, 92028

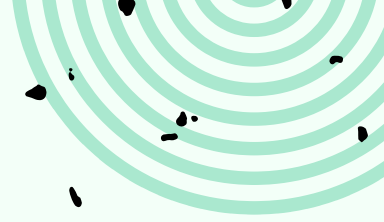
Fallbrook Regional  
HEALTH  DISTRICT

- CERTIFICATE OF COMPLETION AT THE END OF THE PROGRAM
- VOLUNTEER HOURS AVAILABLE

For more information,  
please call or text Selene at:

 (951) 594-0201





# Programa de Bienestar para Adolescentes

¡ACOMPÁÑANOS!

6 CLASES, LOS TEMAS INCLUIRÁN:

1. Introducción y Reglas de Privacidad HIPAA
2. Concientización y Prevención de Drogas
3. Concientización sobre la salud mental, nutrición y actividad física
4. Concientización sobre planificación familiar e infecciones de transmisión sexual (ITS)
5. Relaciones saludables y bienestar digital
6. Habilidades para la vida y planificación futura para incluir la participación de ayuda comunitaria

Todos los Miércoles  
Apartir del 30 de Agosto  
De: 3:30 pm - 4:30 pm

## UBICACIÓN:

Fallbrook Family Health Center  
1328 South Mission Rd,  
Fallbrook CA, 92028



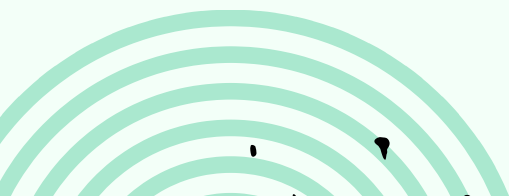
¡Rifas!  
Bocadillos  
refrescantes

Fallbrook Regional  
HEALTH DISTRICT

- CERTIFICADO DE COMPLETAMIENTO AL FINAL DEL PROGRAMA
- OPORTUNIDAD DE RECIBIR HORAS VOLUNTARIAS

Para obtener más información,  
por favor llame o envíe un texto a Selene al:

 (951) 594-0201



### **Quarter 1 Impact Story – Teen WHEEL Program**

At the start of the program, a senior student from Fallbrook High School joined the Teen WHEEL workshops to gain volunteer hours for school. During the initial workshop, he appeared disengaged and uninterested; however, as the class continued, he started to participate in conversations and became more engaged. Despite being only 17 years old, he works full-time and still attends the workshops to gain more volunteer hours and become a Teen Ambassador. He has even volunteered to attend the Eye on Health Youth Festival on September 30th, initially planning to help for only two hours. However, he has been so engaged that he has shared his desire to become a Fallbrook firefighter with the Teen WHEEL workshops hosts: Health Educator, Selene and the Community Relations Manager, Marina; They encouraged him to speak with the Fire Department, and he was able to meet their captain. Being part of the WHEEL program helped him become more open and confident to socialize and think about career development. This student is now enrolled to be a future firefighter and he is appreciative of the encouragement and mentoring from Selene.

## Organization Information

### Legal Name

Fallbrook Food Pantry

### DBA (if Applicable)

n/a

## Program Name/Title

Alleviating Hunger

## Brief Program Description

The Fallbrook Food Pantry (FFP) provides access to healthy and nutritious food for all. Through food distribution, education, and health monitoring, we work to address food insecurity and the social determinants of health by reducing inequities. Our programs empower our clients to become self-sufficient, independent, and productive community members by offering a well-balanced selection of food, nutrition, wellness, and vocational education.

## Funding Amount Awarded

7746

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	27	2091
Young Adults (13-17)	18	1394
Adults (18-60)	31	2401
Seniors (60+)	24	1859
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

n/a

## Target Population - Gender

	Percent of program participants
Female	80
Male	17
Non-binary	
Unknown*	

## \*Target Population - Gender

n/a

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	100
Very Low (50%) Income Limits, ceiling of \$53,500	
Low (80%) Income Limits, ceiling of \$85,600	
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	

## \*Target Population - Income Level

n/a

**Actual number of residents that directly benefited (participant/client) from this program during this quarter.**

3339

## Program/Services Description - Social Determinants of Health

Economic Stability (Employment, Food Insecurity, Housing Instability, Poverty)

## Program Goal & Objectives

GOAL: We will provide every individual with a minimum of 10-12 pounds of food, weekly, from a determined menu consisting of nutrient-dense fresh produce, dry goods, meat, dairy and grains. OBJECTIVE: During Qtr 1 2023/2024, FFP will feed every individual that seeks food assistance an average of 10-12 pounds of food per week to more than 1100 households.

## Program Outcomes & Measurables

The Pantry fed 7,746 individuals an average of 15 pounds per person, each week during QTR.1 2023/2024, for a total of 116,190 pounds of food distributed.

## Anticipated Acknowledgment

Social Media Postings

Signage at Service Sites

Print Materials to Service Recipients

Website Display

Other

## Terms and Conditions

Accepted

## Authorized Signature



## Contact Information

### Contact Name

Shae Gawlak

### Title

CEO

### Primary Contact Phone

949-235-3539

### Email Address

director@fallbrookfoodpantry.org

## Writing Instructions:

What language(s) does this program accommodate:

English

Spanish

Tagalog

## Acknowledgment of District Support



2022 ANNUAL REPORT.pdf

## Impact Story



MEET WILLIAM.pdf

## Program Budget



ALLEVIATING HUNGER BUD... .xlsx



## MEET WILLIAM



William is a Vietnam Veteran, who served in the US Army from 1967 until 1977. He was just 17 years old when he enlisted, never finishing high school. After a medical discharge from the Army in 1977, due to shrapnel in his back and upper left arm, William spent the better part of ten years struggling with the VA to get appropriate medical coverage and treatment for his non-stop pain. To no avail, William was not successful in getting quality care and eventually suffered from debilitating back and arm pain that prevented him from working beyond 1990. For the past thirty years, William has had to rely on the system to keep him afloat. It wasn't until he was forced to move out of his home in Central California, did he find better support within the San Diego County Human Services Department, where he finally started receiving food stamps and better medical care.

Now living in Fallbrook with his brother and sister-in-law, William has been able to source his services locally and has been an active client at the Food Pantry since January of this year. William says that if it wasn't for the food he receives from us, he wouldn't be able to feed himself healthy meals each week. His EBT dollars were just cut from \$281/month to \$23/month! In frustration, he said this, "No one can live on either amount every monthly! How is it that our system completely disregards those of us who now depend on our country—like they depended on me...and nothing is getting better of us?" With the food that we are able to provide William and other seniors in need with, he feels better knowing that we are on his side and that we will always make sure he has enough food to keep fighting the good fight!

# Our Generous Donors, Sponsors, and Grantors

Financial support from grants, businesses, churches, individuals and service organizations provide the necessary funds needed to maintain our extensive programs, for both the Pantry and Learning Center, and it's because of the generosity of a community filled with caring people and partners, that our organization can support the ever-expanding needs of our underserved friends and neighbors.



*"As we express our gratitude, we must never forget that the highest appreciation is not to utter the words, but to live by them." - JFK*



## Organization Information

### Legal Name

Fallbrook Senior Citizens Service Club, Inc

### DBA (if Applicable)

Fallbrook Senior Center

## Program Name/Title

Congregate Meal Program

## Brief Program Description

The Fallbrook Senior Center offers congregated meals to foster the well-being of seniors by supporting healthy aging, ensuring proper nutrition, and encouraging social interaction. Additionally, we organize health focused trainings and entertaining events with music to promote socialization and enjoyment.

## Funding Amount Awarded

47000.00

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)		
Young Adults (13-17)		
Adults (18-60)	7	9
Seniors (60+)	93	116
We do not collect this data (indicate with 100%)*		

## Target Population - Gender

	Percent of program participants
Female	60
Male	40
Non-binary	
Unknown*	

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	
Very Low (50%) Income Limits, ceiling of \$53,500	
Low (80%) Income Limits, ceiling of \$85,600	

	Percent of program participants
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	100

### \*Target Population - Income Level

We do ask the question, however there is a decline to state box on the form. So far everyone has selected the decline to state box.

### Actual number of residents that directly benefited (participant/client) from this program during this quarter.

125

### Program/Services Description - Social Determinants of Health

Economic Stability (Employment, Food Insecurity, Housing Instability, Poverty)

Neighborhood & Built Environment (Access to Foods that Support Healthy Eating Patterns, Crime and Violence, Environmental Conditions, Quality of Housing)

### Program Goal & Objectives

Through the Congregate Meal Program, the Fallbrook Senior Center strives to reach as many adults as possible aged 60 and over to help alleviate food insecurity and isolation. The goal of the Senior Center is to provide meals with high nutritional value in a social setting at no cost for seniors 60+ residing in the communities of Fallbrook, Bonsall, Rainbow and De Luz. Initiatives are being developed to create greater awareness of the program and thereby attract more seniors who could benefit from participation in the program. The benefits include healthy aging, improved quality of life through good nutrition, and the ability to remain in their homes as long as is safely possible.

### Program Outcomes & Measurables

In line with our objectives, The Fallbrook Senior Center has been providing around 34 daily meals, five days a week, free of charge, to seniors aged 60 and above, creating a communal environment that encourages social interaction. During the first quarter, we distributed a total of 2,070 meals to seniors, and 116 residents of the Health District derived direct benefits from our Congregate Meal Program. Furthermore, we conducted multiple educational sessions, facilitated by nursing students from Cal State San Marcos, covering important subjects like Diabetes, Heart Health, and the advantages of staying adequately hydrated. Additionally, we organized an enjoyable Fiesta featuring a Mariachi Band to commemorate Mexican Independence Day. We have monthly birthday celebrations with music too. Lunch on Fridays is enjoyed with music as well.

### Anticipated Acknowledgment

Print Materials to Service Recipients

Website Display

### Terms and Conditions

Accepted

### Authorized Signature



## Contact Information

### Contact Name

Susie Gonsalves

### Title

Executive Director

### Primary Contact Phone

7607284498

### Email Address

fallbrookscdirector@gmail.com

## Writing Instructions:

What language(s) does this program accommodate:

English

Spanish

## Acknowledgment of District Support

FALLBROOK SENIOR CENTER SEPTEMBER 2023 MENU				
Serving Lunch at the Fallbrook Community Center - 341 Heald Lane Monday - Friday Doors open at 10:30 760-728-4498				
MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
<p>Suggested contribution: \$5.00 per meal for seniors 60 and older. There is a \$10.00 charge for non-seniors. Meals include small salad, bread, and milk. Menus are subject to change without notice. ▲ denotes total &gt;1,600 mg of sodium.</p> <p>Fallbrook Regional HEALTH DISTRICT</p> <p>HHSAA</p>				
<p>4 <b>CLOSED</b> <b>Labor Day</b></p>	<p>5 Baked Chicken Roasted Brussels Sprouts Sweet Potato Mixed Green Salad w/garbanzo Whole Wheat Roll Apple</p>	<p>6 Sweet and Sour Chicken Meatballs Butternut Squash Whole Wheat Pasta Mixed Green Salad w/beans Yogurt with Strawberries</p>	<p>7 Meat Loaf w/gravy Spinach Baked Potato Mixed Green Salad w/red peppers Whole Wheat Roll Blueberries</p>	<p>8 Celebrating Squash Blossoms Day Baked Pollock California Blend Brown Rice Coleslaw Whole Wheat Roll - Grapes</p>
<p>11 Egg Plant Parmesan Cauliflower Three Bean Salad Whole Wheat Pasta Yogurt with Blueberries</p>	<p>12 Beef Stew Corn Sweet Potato Mixed Green Salad Whole Wheat Roll Banana</p>	<p>13 Honey Mustard Chicken Spinach Brown Rice Mixed Green Salad w/garbanzo Apple</p>	<p>14 <b>Birthdays Lunch</b> Roasted Turkey Green Beans Mashed Potatoes Mixed Green Salad w/beans Whole Wheat Roll Strawberries</p>	<p>15 Mexican Independence Celebration Fish Taco's Fiesta Blend Black Beans Reservations Required Tortilla Coleslaw Mango</p>
<p>18 Chicken Condon Bleu Collard Greens Quinoa Mixed Green Salad w/garbanzo Honeydew Melon</p>	<p>19 Teriyaki Beef Capri Blend Barley Mixed Green Salad w/red peppers Tropical Fruit</p>	<p>20 Vegetable Noodle Soup Black Beans Whole Wheat Quesadilla with Cheese Mixed Green Salad w/beans Orange</p>	<p>21 Chicken Fajitas Fiesta Blend Brown Rice Mixed Green Salad w/garbanzo Cantaloupe</p>	<p>22 Fish Veracruz Corn with red peppers Coleslaw Roasted Potato Whole Wheat Roll Yogurt w/Strawberries</p>
<p>25 Beef Lasagna Zucchini Whole Wheat Garlic Bread Mixed Green Salad Orange</p>	<p>26 Chicken Salad Sandwich Asparagus Sweet Potato Whole Wheat Sandwich Roll Mixed Green Salad w/beans Apple</p>	<p>27 Turkey Stuffed Bell Pepper Winger Blend Farro Mixed Green Salad w/garbanzo Canned Peaches</p>	<p>28 Beef Stroganoff Baby Carrots Whole Wheat Pasta Mixed Green Salad Cantaloupe</p>	<p>29 Fish and Chips Broccoli Coleslaw Baked Potato Fries Whole Wheat Roll Ambrosia</p>



Newsletter Support Page.pdf

## Impact Story



Story.docx

## Program Budget



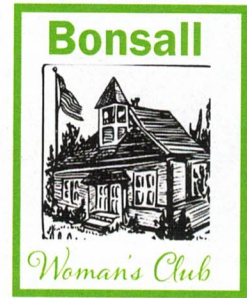
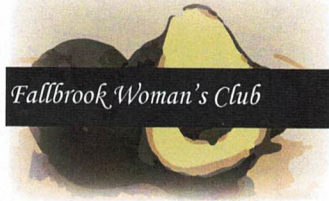
Cong 23\_24 FRHD CHC Prog... .xlsx

## Fallbrook Senior Center Story

My two sisters and I had a great time attending the Senior Center Lunch. We appreciate the delicious and nutritious meals, the warm attention from the staff and volunteers, and the camaraderie and friendships we've developed. It's a wonderful chance to socialize with others and escape the confines of our home.



# - SUPPORTERS -



# - PARTNERSHIPS -



# - IN-KIND DONORS -



## Organization Information

### Legal Name

Michelle's Place Cancer Resource Center

### DBA (if Applicable)

NA

## Program Name/Title

Health Education and Outreach

## Brief Program Description

The Health Education and Outreach program empowers the Fallbrook Regional Healthcare District residents with information and resources to make the best choices for their health and provides cancer patients and their families with resources to support them in their fight against cancer.

## Funding Amount Awarded

21438

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	0	0
Young Adults (13-17)	0	0
Adults (18-60)	50	28
Seniors (60+)	50	30
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

NA

## Target Population - Gender

	Percent of program participants
Female	100
Male	0
Non-binary	0
Unknown*	0

## \*Target Population - Gender

NA

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	0
Very Low (50%) Income Limits, ceiling of \$53,500	49
Low (80%) Income Limits, ceiling of \$85,600	50
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	

### \*Target Population - Income Level

NA

### Actual number of residents that directly benefited (participant/client) from this program during this quarter.

61

### Program/Services Description - Social Determinants of Health

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

### Program Goal & Objectives

The goal of this program is to reach over 2,000 people in the FRHD with education on health and wellness. Through this outreach we hope to increase the number of cancer resources provided by the Fallbrook location by 20%. Program objectives: The Patient Navigator will host at least eight programs at the Fallbrook location that focus on health and wellness. The Patient Navigator will attend at least 12 community events and/or speaking engagements within the FRHD presenting information on free cancer resources available through Michelle's Place. Michelle's Place will provide 20% more resources to the residents of the FRHD than last year.  $375 \times 20\% = 450$  free resources through the Community Health and Wellness Center.

### Program Outcomes & Measurables

This quarter we have made significant strides toward accomplishing our objectives. 1. Patient Navigator will host at least eight programs - We hosted three cancer support groups, three, Mind, Body and Beyond classes and one brunch and learn - an educational seminar with Hospice of the Valley partnership. 2. The Patient Navigator will attend at least 12 community events and /or speaking engagements - The Patient Navigator visited 13 locations within the FRHD to share information with local business about MP resources available in Fallbrook at the Wellness Center. Additionally, we hosted the Fallbrook Sunupper in September. 3. Michelle's Place will provide 20% more resources to the residents of the FRHD than last year = 450 resources. MP provided 182 resources this quarter.

### Anticipated Acknowledgment

Social Media Postings

Signage at Service Sites

Print Materials to Service Recipients

Website Display

### Terms and Conditions

Accepted



**Authorized Signature**

A handwritten signature in black ink, appearing to read "K. D. Smith", written in a cursive style.

## Contact Information

### Contact Name

Kim Gerrish

### Title

Executive Director

### Primary Contact Phone

951-699-5455

### Email Address

kim@michellesplace.org

## Writing Instructions:

What language(s) does this program accommodate:

English

Spanish

## Acknowledgment of District Support



Fallbrook Oct 2023 calendar.pdf

## Impact Story



## Program Budget



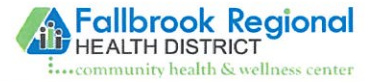
23\_24 FRHD CHC Cancer Ca... .xlsx



# October 2024 Events



Made possible through



## Events for October 2024

### October 10<sup>th</sup> at 11am: Mind, Body, and Beyond

Zumba with Alessandra at the Fallbrook Regional Health District.

### October 11<sup>th</sup> at 10am: Cancer Support Circle

The Impossible Dream Tea Party with fun hats, food, and crafting.

This will be held off site. Fun hats are encouraged. Space is limited and RSVPs are required. Reference Sign up Genius for more details.

Every Thursday in October Tai Chi is offered to all.

RSVP through [Sign up Genius](#)

Email or call 951.699.5455

## No One Should Face Cancer Alone

1636 East Mission Rd. Fallbrook, CA 92028

Fallbrook Regional Health District

Community Health and Wellness Center

## Organization Information

### Legal Name

Michelle's Place Cancer Resource Center

### DBA (if Applicable)

NA

## Program Name/Title

Mental Health for Cancer Patients

## Brief Program Description

Mental Health for cancer patients provides much needed one on one counseling for cancer patients and their families who are in need of qualified mental health resources stemming from their cancer diagnosis. This program is available for private sessions for the patient and family members.

## Funding Amount Awarded

27234

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)		
Young Adults (13-17)		
Adults (18-60)	100	2
Seniors (60+)		
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

NA

## Target Population - Gender

	Percent of program participants
Female	100
Male	0
Non-binary	0
Unknown*	

## \*Target Population - Gender

NA

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	0

	Percent of program participants
Very Low (50%) Income Limits, ceiling of \$53,500	
Low (80%) Income Limits, ceiling of \$85,600	100
Higher Than Listed Limits	0
We do not collect this data (indicate with 100%)*	0

**\*Target Population - Income Level**

NA

**Actual number of residents that directly benefited (participant/client) from this program during this quarter.**

2

**Program/Services Description - Social Determinants of Health**

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

**Program Goal & Objectives**

The program goal is to provide at least 20 families dealing with cancer with mental health resources to help them in their cancer journey.

**Program Outcomes & Measurables**

We have introduced the program to our clients and started education and outreach about the program. We anticipate growing the program in the next quarter. 1. Provide 20 families in the FRHD with one on one counseling services within 12 months. We provided two families with eight total sessions this quarter.

**Anticipated Acknowledgment**

Social Media Postings

Signage at Service Sites

Print Materials to Service Recipients

Website Display

**Terms and Conditions**

Accepted

**Authorized Signature**



## Contact Information

### Contact Name

Kim Gerrish

### Title

Executive Director

### Primary Contact Phone

951-699-5455

### Email Address

kim@michellesplace.org

## Writing Instructions:

What language(s) does this program accommodate:

English

## Acknowledgment of District Support



Fallbrook VBJ Sept 2023.pdf

## Impact Story



## Program Budget



23\_24 FRHD CHC Mental He... .xlsx



RANCHO VISTA ROAD.

Participants can pre-register online at [TemeculaCA.gov/ColorRun](http://TemeculaCA.gov/ColorRun) to save time on race day!

City of Temecula Council Member and Community Services District Presi-

ph at Temecula's Community Recreation Center (30875 Rancho Vista Road).

For more information, please visit [TemeculaCA.gov/ColorRun](http://TemeculaCA.gov/ColorRun) or call 951-694-6410.

Entry Fee: \$15

**Kids Obstacle Course – Youth (5-12 years)**

Start Time: 9:45 am

Entry Fee: \$10

## Behavioral Health Resources Available for Cancer Patients and Their Families

A cancer patient is twice as likely to suffer with mental and emotional distress than the average American. This distress can continue from diagnosis through treatment, and well into survivorship stage. Mental stress and anxiety can affect and prevent the body from fighting disease, recover from surgeries and treatment. At Michelle's Place Cancer Resource Center, 80% of the client's report stress, depression, and anxiety from a diagnosis and unfortunately the family members are also affected mentally and emotionally. The COVID Pandemic placed a severe strain on the medical industry and finding a mental health provider that can take in a new client has become close to impossible, especially if a patient's finances are limited.

As a result, Michelle's Place approached this need with an innovative solution for their clients and their families to access behavioral health resources. A partnership through Pepperdine

University in 2022 made it possible to utilize practicum students who can provide behavioral health services under the supervision of a licensed clinician. This step has opened the doors for many other Universities to join hands with Michelle's Place such as Loma Linda and Tulane University. Triple Moon Psychotherapy Collective's Clinical Supervisors are all licensed therapists and can provide supervision to practicum students and interns to provide one on one sessions to clients and their family members yearly at no cost. This also assists the community by infusing new soon to be providers into the network of providers for Behavioral Health Services. Michelle's Place is determined to grow this program and ensure our clients get the resources they need.

Shanda Brennan, MSW, CSW, LCSW, co-founder and CEO of Triple Moon Psychotherapy Collective and Director of Behavioral Health explains in more detail the importance of this

program. "The psychosocial and psychiatric impact that a cancer-burden brings to an individual and their support partners is often immense and can result in substantial impact on mental health and wellbeing. This also means the long-term impacts of a cancer diagnosis on mental health are being more often realized with upwards of 35% of patients reporting symptoms of depression and/or anxiety post-diagnosis. Mental health during and post-treatment is less prioritized than treating the disease itself due to many influences, including access to care. Here at Michelle's Place, we are pleased to be breaking down these barriers and offering no-cost mental health services

to our clients, their families, and their support network, provided by licensed therapists and supervised graduate level interns. Through the expansion of our mental health services, we have built upon our mission that "No one should face cancer alone."

This program is being made possible through grant funding from the Fallbrook Regional Health District, Kaiser Permanente Foundation, Supervisor Chuck Washington and the Inland Empire Community Foundation, Seraphim Fund.

For more information on Michelle's Place Cancer Resource Center visit [www.michellesplace.org](http://www.michellesplace.org) or call 951-699-5455.



*Michelle's Place*  
**Cancer Resource Center**

## Organization Information

### Legal Name

Palomar Family Counseling Service, Inc.

### DBA (if Applicable)

n/a

## Program Name/Title

Grandparents Raising Grandchildren

## Brief Program Description

When parents are unable to raise their children, it is often grandparents who step in. Grandfamilies thrive when they get the support they need. Grandparents Raising Grandchildren is a comprehensive service that fosters healthy grandparents and a strong and stable family.

## Funding Amount Awarded

15000

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	0	
Young Adults (13-17)		
Adults (18-60)	50	14
Seniors (60+)	50	14
We do not collect this data (indicate with 100%)*	0	

## Target Population not collected - Age

NA

## Target Population - Gender

	Percent of program participants
Female	82
Male	18
Non-binary	
Unknown*	

## \*Target Population - Gender

NA

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	20
Very Low (50%) Income Limits, ceiling of \$53,500	36
Low (80%) Income Limits, ceiling of \$85,600	44
Higher Than Listed Limits	
We do not collect this data (indicate with 100%)*	

## \*Target Population - Income Level

NA

## Actual number of residents that directly benefited (participant/client) from this program during this quarter.

28

## Program/Services Description - Social Determinants of Health

Economic Stability (Employment, Food Insecurity, Housing Instability, Poverty)

Social & Community Context (Civic Participation, Discrimination, Incarceration, Social Cohesion)

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

## Program Goal & Objectives

The goal of GRG is to ensure the health and wellbeing of grandparents raising their grandchildren in Fallbrook and its neighboring communities of Bonsall, Rainbow, and De Luz by providing a comprehensive service that promotes a strong and stable family. Objective 1: Improve family functioning and decrease family stress by providing customized case management services and parent coaching. Objective 2: Decrease social isolation and increase connection to a community of supports by providing at minimum, quarterly educational, self-care and social workshops and gatherings. Objective 3: Provide effective case management and support services that meet the needs of grandfamilies and their grandchildren, in order to create an environment where the full potential for health and well-being can be met.

## Program Outcomes & Measurables

OUTCOME MEASURE 1: By 6/30/24, 30 grand families will be connected to the services and supports they or their grandchildren need including parent coaching and report decreased stress and improved family functioning on self-report surveys administered semi-annually. Eighteen grand families were connected to over 39 services and supports over the 1st quarter. Access to food donations and parenting support were the most requested services. Self-report surveys are sent in Q2 and Q4.

OUTCOME MEASURE 2: By 6/30/24, 25 grandparents will participate in at least one educational, self-care or social workshop every 6 months and report decreased feelings of loneliness, improved mood, and overall increased resilience on a self-report survey administered semi-annually. A family day to support grand families connecting socially was hosted by PFCS in association with our Full Service Partnership program. 6 grand families attended. Self-report surveys are administered in Q2 and Q4.

OUTCOME MEASURE 3: 80% of grandparents who receive case management or support services between July 1, 2023 and June 30, 2024, will: a) rate their satisfaction with services as 9 or 10 (top highest ratings) on a 10 point scale administered 2 times per year via an anonymous electronic survey; and b) would recommend this service to a friend or family member. Satisfaction Data is collected in Q2

& Q4.

### Anticipated Acknowledgment

Social Media Postings

Print Materials to Service Recipients

Website Display

### Terms and Conditions

Accepted

### Authorized Signature

A handwritten signature in black ink, appearing to be "E. J. M.", written in a cursive style.

## Contact Information

### Contact Name

David Drazenovich

### Title

Director of Development & Communications

### Primary Contact Phone

760-466-8887

### Email Address

ddrazenovich@pfcs.agency

## Writing Instructions:

What language(s) does this program accommodate:

English

Spanish

## Acknowledgment of District Support



Blog Post on our Website.pdf

## Impact Story



GRG Q1 Impact Story.pdf

## Program Budget



FY 23-24 GRG Program Bud... .xlsx



pfcs

Palomar Family Counseling Service, Inc.

## Grandparents Raising Grandchildren

Success Story: Quarter 1 - September 2023

### A SNAPSHOT OF SERVICE DELIVERY FOR ONE GRAND FAMILY

---

For over 1 ½ years I been supporting a wonderful grand family. The grandparents have been raising two of their grandchildren since infancy - they are now teenagers. The grandparents have faced many challenges with their grandchildren such as health issues, education, transportation, nutrition, mental health, law enforcement, and social services.

We have built a strong connection and I understand their culture. They have formed a strong relationship with the entire PFCS family and will stop by with a home cooked meal for everyone at the office. They feel comfortable coming to the office when they have questions or concerns.

Services I have provided include:

- Education and resources on e-cigarettes / vaping
- The effects of verbal abuse
- The risks of not taking medication when indicated
- Calling the police when you feel in danger or concerns for your safety.
- Coordinating services with the school counselors.
- Coordinating services with APS and Child Welfare Services.
- Connecting with other grandparents.
- Education on self-care
- Assisting with making appointments for health reasons including mental health.
- Going with Grandma to the Sherriff's station in Fallbrook for moral support when she has questions
- Resources for public transportation
- Speaking to the biological father to provide information in regards to medical and other matters.

I will soon be assisting with a legal matter. The biological mother has returned and is asking. for her parental rights to be restored and for the grandparent's legal guardianship to be terminated.

These two grandparents always show up to community resource fairs and other events to support the program and other grandparents. They provide donations that will assist other families.

This program, your support, is making a difference. I wanted you to know.

Respectfully,

Graciela Morena, Program Coordinator

120 W. Hawthorne, Fallbrook, CA  
760-741-2660

pfcs@pfcs.agency  
www.palomarfamilycounseling.com

## Blog Post on our Website:

### Extraordinary People

*"There is no power for change greater than a community discovering what it cares about."* Margaret J. Wheatley

submitted by Elizabeth Nua, LMFT



Thank you to all who donated and worked together to make this Grandparents Raising Grandchildren event, held on June 28<sup>th</sup> a success!! It takes a village not only to raise a child, but also to see a need and answer the call of your fellow neighbors through support, volunteered time, and donations!!

On behalf of Palomar Family Counseling Service, Graciela Moreno and I are proud to work collaboratively with Brooke and Gabby with the County of San Diego and their amazing team, The Fallbrook Regional Health District, Fallbrook Family Health Center, Cal Fresh, CaregiverCenter.org, Fallbrook Library, The Migrant Education Program, The Fallbrook Food Pantry, and Palomar Family Counseling's amazing Full Service Partnership staff members who volunteered to help work the event!!! THANK YOU FOR BEING THE VILLAGE!!



This passion project started due to a great idea by Graciela Moreno with Palomar Family Counseling, to help the growing number of grandparents raising grandchildren, in the community she loves and where she grew up. [Fallbrook Regional Health District](#) answered the call and provided a grant to fund this amazing program to provide case management and support to grandparents raising their grandchildren in Fallbrook, Bonsall, Rainbow, and De Luz. In addition, the [Legacy Endowment – the Community Foundation](#) believes in and continues to support and fund our amazing workshops that help provide resources, information, and social connections.

We are so grateful for our partners and amazing community members who graciously helped out. A special thanks to [Cocina Del Charro](#), Kathleen May, Nichole Marsh, Deanna Williamson, and Jodi Erickson for the last-minute requests to help fulfill the need. We were able to provide 267 backpacks and school supplies.

The families had a blast... there was live music by an amazingly brave tween violinist, bubble party, dancing music, face painting, snacks, prizes, popsicles, backpacks and school supplies. Grandparents received information, resources, and raffle prizes.

Today was a good day and we thank you!!



## Organization Information

### Legal Name

Palomar Family Counseling Service, Inc.

### DBA (if Applicable)

n/a

## Program Name/Title

Healthy Bodies, Healthy Minds

## Brief Program Description

Mental health is foundationally tied to physical health and quality of life. Healthy Bodies, Healthy Minds is an integral part of the comprehensive services we provide. In partnership with FRHD, we reduce disparities in access to professional, affordable, culturally competent, mental health services. Everyone should look forward to tomorrow.

## Funding Amount Awarded

51860

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	51	24
Young Adults (13-17)	11	5
Adults (18-60)	32	15
Seniors (60+)	6	3
We do not collect this data (indicate with 100%)*		

## Target Population not collected - Age

NA

## Target Population - Gender

	Percent of program participants
Female	66
Male	34
Non-binary	
Unknown*	

## \*Target Population - Gender

NA

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	4
Very Low (50%) Income Limits, ceiling of \$53,500	9
Low (80%) Income Limits, ceiling of \$85,600	70
Higher Than Listed Limits	17
We do not collect this data (indicate with 100%)*	

### \*Target Population - Income Level

NA

### Actual number of residents that directly benefited (participant/client) from this program during this quarter.

47

### Program/Services Description - Social Determinants of Health

Education Access & Quality (Early Childhood Education and Development, Enrollment in Higher Education, High School Graduation, Language and Literacy)

Social & Community Context (Civic Participation, Discrimination, Incarceration, Social Cohesion)

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

### Program Goal & Objectives

Program Goal Ensure that residents of the Fallbrook Regional Health District have access to and receive high-quality, affordable, and culturally competent mental health care in order to enhance overall well-being and quality of life, particularly for low-income and minority communities. Program Objectives Objective 1: Children and Youth Provide after school, office-based or telehealth counseling services to 70 referred children and youth between July 1, 2023 and June 30, 2024 individually or in small groups, in order to improve behavioral, emotional, and/or social functioning. Objective 2: Adults Provide office based or telehealth counseling to 20 self-referred adults between July 1, 2023 and June 30, 2024 in order to improve mental, behavioral, emotional, and/or social functioning. Objective 3: Wellness Groups Offer 4 community-based wellness workshops to 20 self-referred adults and 15 self-referred children and teens in order to increase the number of individuals who show resilience to challenges and stress, take part in healthy behaviors and develop foundational mental health skills needed now and for their future. Objective 4: Satisfaction Provide effective counseling services that meet the needs of 120 area residents, in order to create an environment where the full potential for health and well-being can be met.

### Program Outcomes & Measurables

Outcome Measure 1 (a): (children & youth) 75% of children who complete 5 or more sessions of individual therapy will improve mental health functioning. Four children, seen individually, all completed 5 or more sessions of therapy and 100% showed significant improvement as measured by therapist observations. Outcome Measure 1 (b): (children & youth) 75% of children who complete 5 or more sessions of group counseling will improve social-emotional functioning. 19 children (ages 6-12) were seen for group counseling over the summer. 8 completed 5 or more sessions and 100% showed significant improvement as measured by therapist and staff reports, the others showed minimal to moderate improvement and participated in 2-4 sessions. 6 adolescent girls participated in a newly formed body image group. Three

completed 5 or more sessions, two completed 3 sessions. Although all showed improvement, the improvement noted was only moderate. One participant was transferred to a higher level of care. Outcome Measure 2: (adults)80% of adults who complete 5 or more sessions of individual counseling will improve mental health functioning. 1 adult and 2 families completed therapy over the summer, the other 16 adult clients seen this quarter are continuing. One adult who completed therapy had received extensive services over the course of almost a full year, for a total of 41 sessions and showed significant improvement. The families who completed therapy significantly improved family functioning over the course of 32 and 17 sessions. Objective 3: Wellness Groups80% who participate in wellness workshops will recommend these workshops to a friend or family member and report improved awareness of social-emotional functioning. The Body Image group (referenced above) is highly needed in the community. The 6 Part Boundary Setting group for adults was well received and highly recommended.

### **Anticipated Acknowledgment**

Social Media Postings

Print Materials to Service Recipients

Website Display

### **Terms and Conditions**

Accepted

### **Authorized Signature**

A handwritten signature in black ink, appearing to be 'A. J. R.', written in a cursive style.

## Contact Information

### Contact Name

David Drazenovich

### Title

Director of Development & Communications

### Primary Contact Phone

760-466-8887

### Email Address

ddrazenovich@pfcs.agency

## Writing Instructions:

**What language(s) does this program accommodate:**

English

Spanish

## Acknowledgment of District Support



Let's talk about Body Image.pdf

## Impact Story



HBHM Q1 2023 Impact & Su... .pdf

## Program Budget



FY 23-24 HBHM Program Bu... .xlsx



pfcs

Palomar Family Counseling Service, Inc.

## Healthy Bodies, Healthy Minds

Success Stories: Quarter 1 - September 2023

### THERAPY FOR POST PARTUM DEPRESSIONS

A mom with three small children was able to receive services for postpartum depression. When she first began, she was overwhelmed and very uncertain as to how to cope. After two months of support, she reported feeling much less alone and isolated, and reported she has many more tools in her tool case to help when the days get tough.

---

### HELPING AN ELDERLY WOMAN MAINTAIN HER INDEPENDENCE

An elderly woman came for services when she had failed her drivers license exam and was at risk of losing her license permanently. Not only was she able to learn some mindfulness and anxiety lowering techniques, but our counselor helped her to find resources that gave extra preparation to seniors who were needing to pass the exam. When she was able to return to counseling a few weeks later, she had a big smile and brought along her new driver's license and shared how she passed the test, and used the same skills to assist her in dealing with another challenging situation. She was so grateful that she got the right help at the right time and said she was telling all of her friends about the wonderful counseling she had received at Palomar Family Counseling.

---

### ONGOING SUPPORT FOR TRAUMA

PFCS staff continued offering support and services to several members of the community who were impacted by the plant nursery shooting that recently happened in Fallbrook. All were offered support in person, as well as by phone with the option of talking in English or Spanish. Two community members pursued further counseling, and completed their services with us. All reported feeling grateful to have services offered to them in a time of very upsetting circumstances. They were offered further services should they need it at any point in the future.

# *Let's Talk About Body Image*

A support group for girls, ages 12 to 14.

Loving your body in our complex world is no easy feat.

This group will explore how we feel about our bodies, food, and pressure from the world about our weight.

*Led by PFCS Counselor Aubrey Callahan .*

Wednesdays  
June 21st - July 26th  
4 pm - 5 pm

**To register call Ruby Pereda**  
**760-466-8873 (English or Spanish)**  
Palomar Family Counseling Service  
120 W. Hawthorne  
Fallbrook, CA 92028

No insurance or Medi-Cal required. No cost to participant.

Funding provided by:

# *Hablemos de la imagen saludable del cuerpo*

Un grupo de apoyo para niñas de 12 a 14 años.

Amar tu cuerpo en nuestro complejo mundo no es tarea fácil

Este grupo explorara como nos sentimos de nuestros cuerpos de la comida, y la presion del mundo sobre nuestro peso. (grupo en inglés para jovensitas entre 12 a 14 año)

*Dirigido por la consejera Aubrey Callahan de PFCS.*

Miércoles

21 de Junio al 26 de Julio

4 pm - 5 pm

**Para registrarse llame a Ruby Pereda  
760-466-8873 (habla ingles y español)**

Palomar Family Counseling Service  
120 W. Hawthorne  
Fallbrook, CA 92028

No se requiere aseguranza ni medical. Sin costo para el participante.

Fundado por :

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## *REINS Therapeutic Horsemanship Program*

### *Impact Story 1<sup>st</sup> Quarter*

*10/9/2023*

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*All names in this story have been changed to ensure anonymity*

Ethan arrived at REINS as tightly wound as a spring ready to pop, his shoulders stiffly set, and his jaw clenched so hard I could see the muscles of his jaw working the tension to keep it from exploding out of his body. As I introduced myself, I was surprised and how softly spoken he was, looking in my eyes but keeping his lips from smiling. He explained how he was a little nervous but didn't want to give away anything to show he was scared.

As we made our way down to the horses, Ethan muttered a few sentences explaining his situation, how long he was in the Marine Corps and that he is getting out in about two months. I could tell as we walked closer to the horses, that he was going to need a slow introduction to make him feel comfortable around the horses.

As I put the halter on the horse, I explained what the plan was for today, I was allowing him to take the lead and communicate what he was feeling and if he was comfortable. As I talked him through brushing the horse's body I could tell from the tension and shakiness of his voice that he was extremely nervous. So, I had him put both hands on the side of the horse's sides, close his eyes and breathe along with the rise and fall of the horse's belly. This grounding exercise is a way to lower the stress level, in turn, lowering the alertness in the horse. As Ethan continued breathing with the horse, his shoulders fell, his hands quit shaking and his jaw became slack. Upon opening his eyes, Ethan noticed that his horse's head was lower, and her eyes were almost closed. I explained to him that the symbiotic relationship that he has with his horse allows each to feed off the energy of the other. By watching his horse, he will learn to understand what he is feeling, and how he can help his horse by helping himself to feel calmer using the tools he is learning here. As Ethan walked to his car that day, I noticed that his shoulders were still relaxed, and his gait was less rigid.

The next week when Ethan arrived for his lesson, I didn't see the nervousness or tension that he had shown me the week before. He was willing to try to put the halter on himself, and the first thing he wanted to do was the grounding exercise. He indicated to me that he wanted to make sure his horse was relaxed before he asked her to do anything. It was evident to me that the time with his horse the week before had impacted him positively. He was willing to use the grounding exercise to make himself calmer for the horse.



Ethan was motivated by this opportunity, once he felt comfortable, he was all in! He decided that coming twice a week would benefit him the most, and since REINS offers this service free of charge for military/veterans/first responders for 8 sessions he wanted to fit them all in before being sent home. The last week Ethan came to REINS, he was allowed to ride, and although he was nervous, he climbed on and immediately started his grounding. Seeing the immediate relaxation of his horse, he relaxed as well. I was able to get in contact with a center in his home town that will continue this service for him, for which he was grateful. He explained that he was so nervous that first day that he would have taken any excuse to not come, however, because it was free to him and was flexible about scheduling, he really didn't have a reason not to try it.

This program is supported by the Fallbrook Regional Health Care District, and it allows REINS to provide this service at no cost to the clients. The opportunity to open accessibility is incredibly important, especially for those that are nervous about getting mental health help. Fallbrook has this unique program that is not offered in other areas, we are making a difference in the military, veterans, and youth in this area with no barriers to accessibility.

## Organization Information

### Legal Name

Riding Emphasizing Individual Needs & Strengths

### DBA (if Applicable)

REINS Therapeutic Horsemanship Program

## Program Name/Title

Equine-Assisted Mental Health Program

## Brief Program Description

REINS now offers equine-assisted mental health programming for at-risk youth, Veterans, and individuals struggling with addiction. Working with a licensed mental health professional, PATH certified Equine Specialists in Mental Health and Learning (ESMHL) and healing horses, these sessions can have a powerful and lasting impact on mental health and well-being.

## Funding Amount Awarded

25000

## Target Population - Age

	Percent of program participants	Estimated number of participants
Children (infants to 12)	50	3
Young Adults (13-17)	17	1
Adults (18-60)	33	2
Seniors (60+)	0	0
We do not collect this data (indicate with 100%)*	0	0

## Target Population not collected - Age

n/a

## Target Population - Gender

	Percent of program participants
Female	33
Male	67
Non-binary	0
Unknown*	0

## \*Target Population - Gender

n/a

## Target Population - Income Level

	Percent of program participants
Extremely Low-Income Limits, ceiling of \$32,100	0
Very Low (50%) Income Limits, ceiling of \$53,500	4
Low (80%) Income Limits, ceiling of \$85,600	2
Higher Than Listed Limits	0
We do not collect this data (indicate with 100%)*	0

## \*Target Population - Income Level

n/a

**Actual number of residents that directly benefited (participant/client) from this program during this quarter.**

6

## Program/Services Description - Social Determinants of Health

Social & Community Context (Civic Participation, Discrimination, Incarceration, Social Cohesion)

Healthcare Access & Quality (Access to Health Care, Access to Primary Care, Health Literacy)

## Program Goal & Objectives

Improve the mental health, overall well-being and quality of life for more residents of the district struggling with mental illness, addiction, socialization, and trauma, via safe and effective equine-assisted intervention with low barriers to entry.

1)

1) Serve at least 100 new residents in the district. Contract an effective licensed mental health professional or practice within the district for a minimum of 1 year, to expand the program to individuals and groups that do not have a staff professional and provide excellent care between July 1, 2023 – June 30, 2024.

1) 2) Provide a service at no cost to the participants that will address mental health challenges affecting our immediate community by initiating a scholarship program in partnership with FRHD covering the program cost of at least 5 youth cohorts (servicing between 40-50 individuals) between July 1, 2023- June 30, 2024.

## Program Outcomes & Measurables

1)

1) REINS will hire a licensed mental health professional(s) and provide reporting on all hosted sessions. Participant surveys will include satisfaction ratings for experience with mental health professional(s). At least 80% of participants will self-report improvement after each 8-week session. 1A) REINS has one contract in negotiations.

1) 2) REINS will retain 5 new youth cohorts by collaborating with other youth-oriented organizations in the district. Scholarship paperwork will be required and data will be provided to FRHD. All participants and parents will receive surveys prior to the start of sessions and at the close of sessions. At least 80% of participants will self-report improvement after each 8-week session. 2A) One cohort contract was obtained, but has been delayed and is set to begin during quarter 2.

## Anticipated Acknowledgment

Social Media Postings

Website Display

Other

**Terms and Conditions**

Accepted

**Authorized Signature**

A handwritten signature in black ink, appearing to be 'S. J. ...', written in a cursive style.

## Contact Information

### Contact Name

Stephanie

### Title

Unger

### Primary Contact Phone

760-731-9168

### Email Address

stephanie@reinsprogram.org

## Writing Instructions:

**What language(s) does this program accommodate:**

English

# Acknowledgment of District Support



## Impact Story



FRHD impact statement firs... .docx

## Program Budget



FRHD CHC Program Budget ... .xlsx

**RESOLUTION NO. \_\_\_\_\_**

**RESOLUTION OF THE BOARD OF DIRECTORS OF THE FALLBROOK  
REGIONAL HEALTH DISTRICT APPROVING THE STATEMENT OF  
INVESTMENT POLICY FOR FISCAL YEAR 2022-2023**

WHEREAS, the Board of Directors may approve and adopt a Statement of Investment Policy; and

WHEREAS, the annual Statement of Investment Policy must be reviewed and adopted at a public meeting, the Investment Policy of the Fallbrook Regional Health District shall be as follows:

Section 1 - General Provisions and Objectives

Fallbrook Regional Health District ("District") is a local agency organized and existing pursuant to the California Healthcare District Law (Health & Safety Code Sections 32000, et seq.).

District funds not required for immediate expenditure will be invested in compliance with this policy and the provisions of California Government Code Sections 53600, et seq. Criteria for selecting investments and the absolute order of priority are safety, liquidity, and yield. Investments will be made in a range of instruments and maturity dates to ensure diversification and liquidity of assets in an emergency or when a large cash outlay is necessary. In accordance with California Government Code Section 53607, the authority to invest or reinvest the funds of the District is retained by the Board, with the advice of the Finance Committee.

Section 2 – Prudent Investor Standard

All participants in the investment process shall recognize that the investment portfolio is subject to the prudent investor standard as set forth in California Government Code Section 53600.3 and to public review and evaluation and shall seek to act responsibly as fiduciaries of the public trust. Investments shall be made with the exercise of that degree of judgment and care under circumstances then prevailing which persons of prudence, discretion, and intelligence exercise in the management of their own affairs, not for speculation but for investment, considering the preservation of capital, the cash flow needs of the District as well as the income to be derived. In a diversified portfolio, occasional measured losses may be inevitable and must be considered within the context of the overall portfolio's return and the cash flow requirements of the District.

Section 3 – Credit Risk

A. Credit risk is the risk that an issuer or other counter-party to an investment will not fulfill its obligation. Concentration of credit risk is the risk of loss attributed to the magnitude of a District's investment in a single issuer. All participants in the investment process shall consider aversion to concentration of credit risk by:



1. Limiting investment purchases to those types and amounts permissible by California Government Code § 53601 and Section 6 of this Resolution;
2. Investing no more than twenty-five percent (25%) of the portfolio with one issuer, except as noted in §6 below; and
3. If pursuing a rated investment, investing only in investments with an AA+/A1 or better rating from Standard and Poor's Corporation and AA1/P2 or better from Moody's Investors Service Inc. at the time of purchase.

B. Custodial credit risk is the risk that the District will not be able to recover deposits or the value an investment or collateral securities that are in the possession of an outside party. All participants in the investment process shall consider aversion to custodial credit risk by:

1. Investing no more than twenty-five percent (25%) of the portfolio with one financial institution, with the exception of a Local Government Investment Pool (LGIP), the US Treasury, and funds advanced or in trustee accounts for project construction; and
2. If pursuing a deposit, ensuring that all deposits are fully collateralized as required by California Government Code Section 53652, or are insured by the Federal Deposit Insurance Corporation or National Credit Union Administration, and the "Contract for Deposit of Monies" will indicate the type and amount of collateral.

#### Section 4 – Interest Rate Risk

Interest rate risk is the risk that changes in interest rates will adversely affect the fair value of an investment. All participants in the investment process shall consider aversion to interest rate risk by limiting the term remaining to maturity on purchased investments to five years, unless a longer term is permissible within the California Government Code and specifically approved by the Board prior to purchase.

#### Section 5 - Ethics and Conflict of Interest.

All participants in the investment process shall seek to act responsibly as custodians of the public trust. All officials, officers, and employees involved in the investment process shall refrain from personal business activity that could conflict with proper execution of the investment program or which could impair his/her ability to make impartial investment recommendations and decisions. All officials, officers, and employees involved in the investment process shall adhere to the District's Conflict of Interest Code, which is updated biennially by the Board.

### Section 6 – Permissible Investments

The permissible investments are as stated in the California Government Code 53600 et seq.

Pursuant to the provisions of California Government Code Section 53601.1, no investment will be made in financial futures or financial option contracts without the prior approval of the Board of Directors. Investments permitted by the California Government Code, but not by this policy, will be made only with prior approval of the Board of Directors.

A thorough investigation of any pool or fund is required prior to investing, and on a continual basis. The purpose of this investigation is to determine the suitability of a pool or fund and evaluate the risk of placing funds with that pool or fund. The investigation shall, at a minimum, obtain the following information:

A description of interest calculations and how it is distributed, and how gains and losses are distributed;

A description of who may invest in the program, how often, what size deposits and withdrawals are permitted;

A schedule for receiving statements and portfolio listings;

A description of the pool/fund reserves or retained earnings, or whether all income after expenses is distributed to participants; and

A fee schedule which discloses when and how fees are assessed.

### §7 – Reporting and Miscellaneous Provisions

Pursuant to California Government Code Sections 53646(b) and 53646(d), a monthly report shall be submitted to the Board of Directors within thirty (30) days following the end of the month covered by the report for review. The report shall include the type of investment, issuer, purchase and maturity dates, rate of interest, dollar amount invested, fund, current market value, and percentage of portfolio. The report shall also state compliance of the portfolio to the statement of the investment policy, or the manner

in which the portfolio is not in compliance. The report shall include a statement regarding the ability of the District to meet its expenditure requirements for the next six (6) months.

The Finance Committee shall establish and maintain a system of internal controls to be examined and monitored by the District's independent auditor. The investment policy shall be reviewed annually by the Board to ensure its consistency with applicable state law.

NOW, THEREFORE, BE IT RESOLVED by the Board of Directors of the Fallbrook Regional Health District as follows:

The Annual Statement of Investment Policy for Fiscal Year 2022-2023 is hereby approved, and the Finance Committee directed to follow this Statement of Investment Policy in investing funds of the District.

PASSED AND ADOPTED by the Board of Directors of the Fallbrook Regional Health District at a regular meeting held on this \_\_\_ day of June 2022, by the following roll call vote:

AYES: \_\_\_\_\_

NOES: \_\_\_\_\_

ABSTAIN: \_\_\_\_\_

ABSENT: \_\_\_\_\_

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Howard Salmon, Chair  
Board of Directors  
Fallbrook Regional Health District

ATTEST:

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Stephanie Ortiz, Secretary  
Board of Directors  
Fallbrook Regional Health District



**RESOLUTION NO. 460**

**RESOLUTION OF THE BOARD OF DIRECTORS OF THE FALLBROOK  
REGIONAL HEALTH DISTRICT APPROVING THE STATEMENT OF  
INVESTMENT POLICY FOR FISCAL YEAR **2023-2024****

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PASSED AND ADOPTED by the Board of Directors of the Fallbrook Regional Health District at a regular meeting held on this 8 day of November 2023, by the following roll call vote:

AYES: \_\_\_\_\_

NOES: \_\_\_\_\_

ABSTAIN: \_\_\_\_\_

ABSENT: \_\_\_\_\_

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William Leach, Chair  
Board of Directors  
Fallbrook Regional Health District

ATTEST:

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Jennifer Jeffries, Secretary  
Board of Directors  
Fallbrook Regional Health District