To Our Stakeholders

FY 2019

BEACON TREE FOUNDATION’S MISSION IS TO BE THE ADVOCATE FOR FAMILIES WHO HAVE CHILDREN STRUGGLING WITH MENTAL ILLNESS BY FOCUSING ON EDUCATION, ACCESS TO SERVICES, AND THE ABILITY TO PAY FOR THOSE SERVICES.

HOPE FOR THE FUTURE
# To Our Stakeholders

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To Our Stakeholders

A Letter from the Founders

As we reflect on this past year in which we celebrated Beacon Tree Foundation’s 11th anniversary, we also must look to the future. We come through another great year and Diana and I offer our sincere thanks to all those who supported our cause through. Those of you who stood by us as we fought to gain momentum, your commitment has brought hope to many families.

This is a new year and we must recommit with the same passion with which we began the foundation at its announcement at our daughter’s graduation from Auldern Academy in North Carolina in May of 2008. We must build on that first scholarship awarded a graduating senior who had overcome their issues and were on their way to college. The foundation did not have the money to cover that scholarship, but we had faith that we would find a way. In the first 3 years we awarded 20 scholarships to graduating high school students from upstate New York to Birmingham, Alabama at five therapeutic boarding schools. That was the beginning. That same faith guided us to greater accomplishments in over the next years.

Looking back at some significant accomplishments:

Over the past eleven years our annual funding of programs has increased by just over 50%.

Since inception, we raised over $500,000 to address the challenges of mental illness among children.

We once again exceeded donations in the amount we spent on direct family support programs by 6%, allowing us to help 15 children struggling with mental illness.

Trees of Hope, our annual awareness and fund-raising event was relocated to Lewis Ginter Botanical Gardens in 2018 to accommodate the year-over-year increase in attendance.

Why Beacon Tree Foundation exists:

Mental health problems affect more than one in five young people at any given time, and the vast majority of those dealing with these emotional and behavioral disorders are not getting the help they need. Most mental illnesses present during a child’s development, with fifty percent of lifetime diagnoses occurring in the mid-teens and with a U.S. median age of onset of 14. Although symptoms occur during the two years prior to meeting diagnostic criteria, treatment lags diagnosis by an average of 10 years. Mental health conditions have life-long effects that include high psychosocial and economic costs, not only for the young people, but also for their families, schools, and communities.
More disturbing is reality at only 20% of those children are ever diagnosed and treated. So you have to ask yourself, what happens to the other 80%? The answer is even more disturbing: the juvenile detention population, the homeless youth, the epidemic of drug addiction and suicide, and yes there is a whole population of youth who grow up thinking that it’s normal to feel bad about themselves and the world they live in. Over 50% of our prison inmates suffer some mental or emotional illness that contributed to their incarceration. Experts tell us had those people been identified and treated at a young age, 75% of those men and women would be productive citizens. This country spends 38 billion dollars a year keeping people in prison. Consider if we spent some of the $38 million on preventive mental health care?

On an individual level, mental health and substance use conditions interfere with a young person’s ability to accomplish developmental tasks, such as establishing healthy interpersonal relationships, succeeding in school, and preparing to participate in the workforce. Left unaddressed, children’s mental health issues can worsen over time and lead to high rates of violence, substance abuse, and academic underachievement in the middle school years—setting the stage for lifelong difficulties. But research also shows that early intervention can prevent significant mental health problems from developing and stunting a child’s development. And intervention that leads to effective treatment can reduce the risk of such consequences.

According to Institute of Medicine, early identification, accurate diagnosis and effective treatment of mental health or substance use conditions in school-aged young people can alleviate enormous suffering and heartbreak and help young people to benefit from their education and to lead productive lives. For early identification to have any value, public and private resources must be available to assure effective treatment.

We believe there are three barriers that hinder a family from accessing children’s mental health services: (1) education: Understanding mental illness is the first step and one that requires better and more frequent information to the public and education is driver in addressing. For the individual family, it demands a great deal of courage to stand up and say your child has mental illness and needs help. There is a huge amount of shame and guilt. (2) access to services: If parents are brave enough to come forward and seek help, where do they go to find what’s appropriate and available? (3) funding care: Private insurance covers very little or you have to qualify for Medicaid. The cost of even an initial psychological evaluation can deter a family from seeking help for their child.
To Our Stakeholders

**Our Purpose:**
Our purpose then is to create an environment in which all children with mental illness get the help they need when they need it, to provide seamless access to mental health resources and avoid acute crises. Through educational initiatives, such as the Trees of Hope, remove the stigma, so families feel safe in pursuing services for a mentally ill child.

By supporting the Children’s Mental Health Resource Center, provide quick and easy access to appropriate service providers.

Gap funding services ensure that families whose children need treatment have the financial resources necessary to complete that treatment.

**Our Vision:**
As we look to the future, we will:
1. Expand Operation On-Ramp as Beacon Tree Foundation’s driver for early intervention; supplemented with funding for support of intensive in-home therapy not covered by private insurance; and increase the capacity of our Family Grant program to have a greater impact on family’s ability to provide appropriate care for their children.
2. Increase public support and participation in Trees of Hope as our major community outreach program.
3. Continue to financially support the Children’s Mental Health Resource Center
4. Create a low-interest K12 loan program for families who need to finance long-term residential treatment.
5. Implement an ongoing annual capital campaign to fund the development and construction of a non-profit based children’s mental health research and treatment facility, provide out-patient and in-patient short and long-term residential treatment.

**2019 Goals:**
1. Further develop Financial Resources
2. Assess performance against mission and key program priorities; improve board performance
3. Build/enhance reputation of organization with stakeholders & community
4. Explore opportunities to merger with other non-profit organizations with similar mission.

Beacon Tree Foundation is committed to creating an environment where every child receives seamless and integrated medical care. Through our educational and advocacy initiatives with the public,
To Our Stakeholders

school, pediatricians and mental health providers; by facilitating access to mental health services through our financial support of the Children’s Mental Health Resource Center; and by providing supplemental funding where private insurance and Medicaid fall short, we can have a positive impact on the youth suicide rate, juvenile detention population, the numbers of homeless youth and the overall quality of life for thousands of young people who are mentally ill or emotionally disturbed.

Tom and Diana Leahy
Founders
To Our Stakeholders

The Year in review

Motivated by the mental health struggles of their three daughters, Tom and Diana Leahy of Midlothian VA founded Beacon Tree Foundation in 2008. They experienced the fear and frustration of trying to understand the illness, navigate a broken mental health system, and find resources to pay for treatment. Given this was our tenth birthday, we decided to streamline our focus for 2019, and renewed our commitment to the core mission. to be an advocate for families with children struggling with mental illness by focusing on education and access to treatment.

What does education mean?

Education is getting out there and talking about mental health and giving people resources they can utilize. It can be anything from presentations and documentary movie screenings to tabling at health fairs and other events.

What does access mean?

Our commitment is to help families who are actively seeking help for a child by funding mental health assessments when income, insurance or Medicaid fall short of covering expensive interventions.

Spreading the word in 2019
To Our Stakeholders

Inspired by the mental health battles of their three daughters, Tom and Diana Leahy of Midlothian VA established Beacon Tree Foundation in 2008. They encountered the dread and dissatisfaction of attempting to comprehend the sickness, navigate a broken mental health system, and find resources to pay for treatment. Beacon Tree was created so others wouldn't have to experience the frustrations as they did.

Our Mission
To be advocates for families with children struggling with mental illness and addiction by focusing on education, access to treatment, and help paying for treatment.

What does education mean?
Education is getting out there and talking about mental health and giving people resources they can utilize. It can be anything from presentations and documentary movie screenings to tabling at health fairs and other events.

What does access mean?
Our commitment is to help families who are actively seeking help for a child by funding mental health assessments when income, insurance or Medicaid fall short of covering expensive interventions.

Spreading the word in 2019
In 2019, Beacon Tree board members were out in the community to spread a message of hope and to educate on mental health and suicide prevention.

We touched thousands through presentations at Rotary, Lion’s and Kiwanis Clubs, YMCAs, chambers of commerce, business networking groups, conferences, high schools, middle schools, colleges, jails, and houses of worship. We trained others and attended training for ourselves.

It was so awesome to hear someone come and just be real about everything. You are totally my favorite and most relatable speaker so far! I did really really appreciate you coming here and just being real with us. You are so amazing!

Feedback from a 15 year old high school student
To Our Stakeholders

OnRamp

Family Funding

With your support, Beacon Tree is helping families and their children access mental healthcare by directly funding the necessary evaluations that lead to a treatment plan. When funding resources have allowed, we have provided gap funds for treatment. **We call it OnRamp because you can’t access a highway without one. And you can’t get treatment without the diagnostic assessment.**

We have been partnering closely with CMHRC, (Children’s Mental Health Resource Center) to improve our processes and now have a Program Committee comprised of trained mental health professionals who review our OnRamp applications. In total, we granted applications so far this year for 13 children.

**Stories from the Caseworkers whose applications were approved for Beacon Tree funding:** *(Identifying information has been changed/removed to protect identity)*

>> Shannon has suicidal ideation currently, as well as a history of it. She also hears voices that are saying negative things. The family hopes to clarify her diagnoses so as to help her relieve the suicidal thoughts and other symptoms. The family also has educational concerns and thinks that Shannon may have dyslexia, so they hope to do learning disability testing. >>

**Shannon** was approved for $1,400 to cover psychological treatment and school supports.
David was approved for $1,100 worth of individual and family trauma treatment

Preventure
An Overview of a Substance Abuse Prevention Program Study Coming to CCPS
Presenter: Anne Moss Rogers, Board member, Beacon Tree Foundation; Owner, Emotionally Naked LLC

There are four traits that Put Kids at Risk of Substance Misuse and in January 2019, VCU Institute of Drug & Alcohol Studies, with Beacon Tree Foundation, won the VCU CCTR Endowment Fund to implement Preventure, a personality-targeted life skills training program that has been shown to reduce drug and alcohol use in schools by up to 80%.

The pilot study, the first in the US, will include four Virginia schools, two of which are in Chesterfield County.

Fundraising
April 2019- Trees of Hope our annual fundraiser event for youth mental health awareness event. We had wonderful performers and heard from many whose lives have been affected by mental health disorders. Watch our website for announcements about our 2020 annual fundraiser.
July 2019 - We met at our Meditation Garden at Byrd Park where we install memorial bricks and have a place where people find peace and tranquility. We had a brick installation ceremony to honor the memories of those who have suffered mental illness.

August 2019 - The Pipehitter’s Union Motorcycle Club hosted a Poker Run to support youth mental health and suicide prevention. This annual event raised nearly $4k and the group gives 100% of the proceeds to the charity they support.

Our latest fundraising campaign emphasizes ongoing gift giving at small amounts. That way it won’t hurt your bank account and with a lot of people participating, we can maintain a steady stream of funding for our programs and be able to help more children in need.

The way we figure it, everyone can give $25 a month which is equal to five cups of coffee from a coffee shop. So we’re asking you to pledge $25-$100, at least the equivalent of five cups of coffee per month, automatically. You can do this in one of two ways. Use our online credit card form online at BeaconTree.org, click the yellow donate button at the top and fill it out the form like you see below. You can choose an amount or make up your own, for example if you want to $35 a month.
The other way to do this is through billpay, have billpay send a monthly check to organizations you support automatically.

Of course we’ll also take an annual donation the old fashioned way, too! Just use the enclosed envelope.

Beacon Tree Online Donation Form

Please use our online form to make your donation today to help youth overcome mental health challenges!

Amount
- $100
- $50
- $25
- $200 - Memorial Brick
- $ 

Donation Schedule
- One Time
- Monthly
- Quarterly
- Annually

Please state the donation you would like to make?

Person's Name or Message

It’s been our honor to serve the mental health needs of area children in 2019 and we appreciate all your notes, phone calls, donations, speaking invitations, emails, sponsorships, and volunteerism.

Yours Truly,

The Beacon Tree Board
To Our Stakeholders

Financial Statements

Statement of Financial Position

- The Beacon Tree Foundation is mainly a volunteer organization. The foundation operates with a limited part-time Executive Director who performs grant writing, administrative tasks and handles donor management. This operational and organizational structure allows Beacon Tree to deliver the most amount of services in line with their core mission based on fund raising through donations, corporate contributions, awareness events and community grants.
- The budget process for Beacon Tree begins each year with an income and expense plan which is modified throughout the year as donations, corporate contributions, fund raising dictates. Certain fixed costs and professional services may change if they are offset by in-kind donations. The financial goals of Beacon Tree Foundation are to deliver the maximum amount of services to families with the funding available. Our
programs and outreach are designed to serve our mission of education, access to youth mental health treatment and ability to pay for those services.

**STATEMENT OF COMPREHENSIVE INCOME (PROFITS AND LOSSES)**

- 2019 Income for Beacon Tree Foundation was $58,016.95 from all sources. Community Support provided the greatest income at $36,150.00
- Expenditures for programs were $31,650.30 in 2019, representing 55% of income.
- Expenses related overhead including fund raising were $21,417.80
- Total Operating Expenses for 2018 was $53,068.10.
- Net Income for 2019 was $4,948.85

**LONG TERM EQUITY**

The Beacon Tree Foundation had restricted funds of $11,078.54 at year’s end, and the Marketable Securities were $16,860.87. This represents the long-term core equity of the organization outside of annual fund raising, grants, donations and other income.

**2018 PROFIT AND LOSS OF BEACON TREE FOUNDATION**

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<tr>
<th>INCOME STATEMENT</th>
<th>ALL REVENUE</th>
<th>ALL EXPENSES</th>
<th>NET INCOME</th>
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<tr>
<td>Income and Expense from all sources</td>
<td>$58,016.95</td>
<td>$53,068.10</td>
<td>$4,948.85</td>
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**STATEMENT OF CASH FLOWS**

- 2019 Beacon Tree Foundation Operating income and in-kind donations totaled $57,666.56
- There was Other Income (unrealized Gain on Investment) of $350.39
- Total Expenses, including in-kind services totaled $53,068.10
- Net Ordinary Income was $4,948.85
- Net Income was $4,948.85
## 2018 End-of-Year Balance Sheet

| ASSETS |  |  
| --- | --- | ---  
| **Current Assets** |  |  
| Checking/Savings |  |  
| 10000 · TowneBank - Gen Checking | $21,988.28 |  
| 10100 · TowneBank Bank Restricted | $11,078.54 |  
| Total Checking/Savings | $33,066.82 |  
| Total Current Assets | $33,066.82 |  
| **Other Assets** |  |  
| 18100 · Towne Investment Group | $16,860.87 |  
| 19999 · Suspense | - $245.00 |  
| Total Other Assets | $16,615.87 |  
| TOTAL ASSETS | $49,682.69 |  

| LIABILITIES & EQUITY |  |  
| --- | --- | ---  
| **Liabilities** |  |  
| Current Liabilities |  |  
| Accounts Payable |  |  
| 20000 · Accounts Payable | $1,816.14 |  
| Total Accounts Payable | $1,816.14 |  
| Total Liabilities | $1,816.14 |  
| **Equity** |  |  
| 32000 · Unrestricted Net Assets | $35,488.43 |  
| 80400 · Unrealized Gain on Investment | $7,439.27 |  
| Net Income | $4,948.85 |  
| Total Equity | $47,866.55 |  
| TOTAL LIABILITIES & EQUITY | $49,682.69 |  

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**NOTES TO FINANCIAL STATEMENTS:**
To Our Stakeholders

INDIVIDUAL AUDITOR’S REPORT:

Beacon Tree Foundation

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