# Annual Report
## Fiscal Year 2016-2017

**Grief Support Groups**
- 1,341 individuals served
  - 673 children • 668 adults • 395 families

**Special Programs**
- 160 family weekend campers
- 102 summer program participants

**Volunteers**
- 962 individual volunteers
  - 18,941 hours • 17:1 volunteer to staff hour ratio

**School-based Groups**
- 50 students at 5 schools served
  - HISD • KIPP • Spring Branch ISD
  - Spring ISD • YES Prep

**Community Education & Training**
- 52 professional trainings
  - 1,761 attendees

**Hispanic/Latino Outreach**
- 404 Hispanic/Latino group participants,
  - 200 participate in Spanish language group

**bosplace.org website**
- August 2016 re-launch
  - 106,373 total hits

**Children's grief assessments**
- 267 completed in partnership with
  - The Trauma and Grief Center at Texas Children's Hospital

---

**Bo's Place exists to enhance the lives of those who have experienced the death of a loved one.**
Our Mission
To enhance the lives of those who have experienced the death of a loved one.

Board of Directors

EXECUTIVE COMMITTEE
Travis Torrence, President
Debbie L. Gregg, LMSW, President Elect
Colleen Cockrum, Secretary
Paul Vincent, Treasurer
Meredith Chastang, Development Chair
Laura Higgins, Outreach Chair
Christina Altenau, Program Chair

MEMBERS AT LARGE
Mary Beth Arcidiacono, LMSW
Rodrigo Cañedo
Tonja De Sloover
Ali Dodson
Allen D. Gibson
Lauren Gray
David A. Hartland
Harvin G. Lawhon
Lindy Upton McGee, M.D.
Charlie Neuhaus
Kathy O'Neil
David A. Pluchinsky
Michael G. Scheurich
David L. Shine
Chase Smith
Sue Smith
Giggy Thanheiser
David Valentine
Frank Verducci
Haresh Yalamanchili, M.D.
Lindy Neuhaus, Member Emerita

Our Vision
Bo's Place is one of the nation’s premier bereavement centers – providing compassionate grief support services and education in order to facilitate the healing of children, families, and adults who have experienced the death of a loved one.

Executive Director
Mary Beth Staine

Financials
Operating Expenses: $2,020,052
Revenue: $1,998,355
Contributions/Grants 53%
Investment Income 3%
Miscellaneous 1%
Special Events* 43%
Program 72%
M&G 10%
Fundraising 18%

* Represents the total less the cost of direct donor benefit
Source: 2016-2017 audited financial statement
## Bo’s Place

Statement of Financial Position as of June 30, 2017

<table>
<thead>
<tr>
<th>ASSETS</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash</td>
<td>$104,102</td>
</tr>
<tr>
<td>Pledges receivable</td>
<td>154,550</td>
</tr>
<tr>
<td>Prepaid expenses</td>
<td>23,001</td>
</tr>
<tr>
<td>Investments</td>
<td>2,882,531</td>
</tr>
<tr>
<td>Property and equipment, net</td>
<td>2,486,925</td>
</tr>
<tr>
<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$5,651,109</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIABILITIES AND NET ASSETS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Liabilities:</td>
<td></td>
</tr>
<tr>
<td>Accounts payable and accrued expenses</td>
<td>$72,813</td>
</tr>
<tr>
<td>Deferred special event revenue</td>
<td>34,526</td>
</tr>
<tr>
<td><strong>Total liabilities</strong></td>
<td>107,339</td>
</tr>
<tr>
<td>Net assets:</td>
<td></td>
</tr>
<tr>
<td>Unrestricted</td>
<td>4,945,147</td>
</tr>
<tr>
<td>Temporarily restricted</td>
<td>598,623</td>
</tr>
<tr>
<td><strong>Total net assets</strong></td>
<td>5,543,770</td>
</tr>
<tr>
<td><strong>TOTAL LIABILITIES AND NET ASSETS</strong></td>
<td><strong>$5,651,109</strong></td>
</tr>
</tbody>
</table>
# Bo’s Place

**Statement of Activities for the year ended June 30, 2017**

<table>
<thead>
<tr>
<th></th>
<th>UNRESTRICTED</th>
<th>TEMPORARILY UNRESTRICTED</th>
<th>TEMPORARILY RESTRICTED</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OPERATING REVENUE:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contributions</td>
<td>$ 559,537</td>
<td>$ 508,028</td>
<td>$ 1,067,565</td>
<td></td>
</tr>
<tr>
<td>Special events</td>
<td>1,108,415</td>
<td>-</td>
<td>1,108,415</td>
<td></td>
</tr>
<tr>
<td>Cost of direct donor benefits of special events</td>
<td>(258,462)</td>
<td>-</td>
<td>(258,462)</td>
<td></td>
</tr>
<tr>
<td>Investment return</td>
<td>66,809</td>
<td>-</td>
<td>66,809</td>
<td></td>
</tr>
<tr>
<td>Other income</td>
<td>14,028</td>
<td>-</td>
<td>14,028</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,490,327</td>
</tr>
<tr>
<td>Total operating revenue</td>
<td>1,490,327</td>
<td>508,028</td>
<td></td>
<td>1,998,355</td>
</tr>
<tr>
<td><strong>Net assets released from restrictions:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program expenditures</td>
<td>406,330</td>
<td>(406,330)</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Expiration of time restrictions</td>
<td>10,386</td>
<td>(10,386)</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,907,043</td>
</tr>
<tr>
<td>Total</td>
<td>1,907,043</td>
<td>91,312</td>
<td></td>
<td>1,998,355</td>
</tr>
<tr>
<td><strong>OPERATING EXPENSES:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program expenses</td>
<td>1,448,309</td>
<td>-</td>
<td>1,448,309</td>
<td></td>
</tr>
<tr>
<td>Management and general</td>
<td>209,432</td>
<td>-</td>
<td>209,432</td>
<td></td>
</tr>
<tr>
<td>Fundraising</td>
<td>362,311</td>
<td>-</td>
<td>362,311</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2,020,052</td>
</tr>
<tr>
<td>Total operating expenses</td>
<td>2,020,052</td>
<td>-</td>
<td>2,020,052</td>
<td></td>
</tr>
<tr>
<td>Operating income</td>
<td>(113,009)</td>
<td>91,312</td>
<td>(21,697)</td>
<td></td>
</tr>
<tr>
<td><strong>NON-OPERATING REVENUE, EXPENSES, GAINS AND LOSSES:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net unrealized gain</td>
<td>167,733</td>
<td>-</td>
<td>167,733</td>
<td></td>
</tr>
<tr>
<td><strong>CHANGES IN NET ASSETS</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Net assets, beginning of year</td>
<td>4,890,423</td>
<td>507,311</td>
<td>5,397,734</td>
<td></td>
</tr>
<tr>
<td>Net assets, end of year</td>
<td>$ 4,945,147</td>
<td>$ 598,623</td>
<td>$ 5,543,770</td>
<td></td>
</tr>
</tbody>
</table>
Bo’s Place gratefully acknowledges the many foundations, corporations, civic and faith-based organizations and individuals who believe in our mission. Our thanks to all of the thoughtful donors who made gifts between July 1, 2016 and June 30, 2017. Listed below are cumulative gifts of $1,000 and above.

**Foundation, Corporation, and Organization Gifts**

**100,000 and Up**
- The Hamill Foundation

**$50,000 to $99,999**
- Ed Rachal Foundation
- New York Life Foundation

**$25,000 to $49,999**
- The Ellwood Foundation
- The George Foundation
- John P. McGovern Foundation
- John S. Dunn Foundation
- The Robert and Janice McNair Foundation
- The Merced Foundation
- SpawGlass Construction Corp.
- Theta Charity Antiques Show

**$10,000 - $24,999**
- Albemarle Foundation
- Albert and Margaret Alkek Foundation
- Amerapex Corporation
- Arch-Con Corporation
- The Brown Foundation, Inc.
- CFP Foundation
- The Coneway Family Foundation
- Desroches Partners LLP
- The Enrico and Sandra Di Portanova Charitable Foundation
- George & Mary Josephine Hamman Foundation
- The Henderson-Wessendorff Foundation
- The Albert and Ethel Herzstein Charitable Foundation
- Jack H. and William M. Light Charitable Trust
- M.D. Anderson Foundation
- The Florence and William K. McGee, Jr. Family Foundation
- Memorial Drive Presbyterian Church
- Momentum Jaguar Land Rover Southwest Houston
- Morgan Stanley Corporate
- National Football League Foundation/
  Greater Houston Community Foundation
- New York Life Company
- Service Corporation International
- St. Anne Catholic Church
- St. John the Divine Episcopal Church
- St. Martin's Episcopal Church
- The Sutton Foundation
- The Tapeats Fund
- Vivian L. Smith Foundation
- Rusty and Paula Walter Family Fund
- Walter Oil & Gas Corporation Charitable Fund

**$5,000- $9,999**
- The Albany Foundation
- Avison Young - Houston, LLC
- BMW of West Houston
- Bonnie and David Weekley Fund
- Bracwell LLP
- Burnett and Company Inc.
- The CBJR Foundation
- CIBC World Markets Corp.
- The Cockrell Foundation
- Energy Transfer Partners
- The Fant Foundation
- The Gayden Family Foundation
- Houston Pi Beta Phi Foundation
- Huffington Foundation
- Imperial PFS
- The Khurana Family Charitable Fund
- The Lyons Foundation
- Macy’s
- Neal Hamil Agency
- Norton Rose Fulbright LLP
- Porter Hedges LLP
- Russell & Smith Ford-Honda-Mazda
- Shell Matching Gifts Program
- SK Foundation
- Spindletop Charities, Inc.
- Strake Foundation
- Superior Energy Services
- Valero Energy Foundation
- The Vaughn Foundation
- Vinson & Elkins, LLP

**$1,000 to $4,999**
- 713 Pilates
- Akerman LLP
- Amegy Bank of Texas
- The Edward H. Andrews Foundation
- Andrews Kurth Kenyon LLP
- The Bagwell Foundation
- BB&T
The Benevity Community Impact Fund
Boat House Gift Trust
Chevron Matching Employee Funds
Direct Energy, LP
Jenny and Jim Elkins Family Fund
Enbridge
Epiphany of the Lord Catholic Community
Exxon Mobil Foundation
First Baptist Church of Houston
Geo. H. Lewis & Sons
Green Trial Law
Greenberg Traurig, LLP
Helmle-Shaw Foundation, Inc.
Houston Ultimate Community
Elva J. Johnston Foundation
Kennedy Hodges, LLP
LeClair Ryan
Legacy Community Health Services
Macquarie Group Foundation
The Matthews Children’s Foundation
Mazda North America Operations
Mischer Investments, LP
The W.T. and Louise J. Moran Foundation
National Automobile Dealers Charitable Foundation
Neuhaus Education Center
The Sydnor and Olga Oden Foundation
The Powell Foundation
The Pursley Law Firm, PLLC
Republic National Distributing Company
River Oaks Baptist School
St. Michael Catholic Church
The Astorian
Tootsies
Vitas Community Connection
Volunteer Houston
Welcome Group, LLC
Westside Lexus & Northside Lexus
YPO Wild West Regional Chapter Inc.

Individual Gifts

$100,000+
The Estate of June Stobaugh

$50,000 – $99,999
June and Bob Stobaugh

$25,000-$49,999
Hannah and Cal McNair

$9,999-$24,999
Lacy Crain and Joe Galloway
Debra and Mark Gregg
Brigitte and Bashar Kalai

$1,000-$4,999
Joan and Stanford Alexander
Lisa Alexander
Nancy and Jose Almodovar
Molly and David Altobelli
Liz and David Anders
Jacquel Andrews
Mary Beth and Johnny Arcidiacono
Frances and Tim Arnoul
Chris and Merrell Athon
Cindy and Buddy Bailey
James Bell, Jr.
Luba and Alan Bigman
Karen and Denis Boulle
Richard Brown
Kathy and Kenneth Brown
Connally and Mark Burroughs, Jr.
Patricia Bushman
Rodrigo Canedo
Emily and Allen Capps
Alexis and Steven Caruselle
Cathy and Paul Chapman
Kristina Chou
Kathy and Bob Christy
Charles Clark, III
Lizzie and Stephen Clarke
Cathy and Joseph Cleary
Suzanne Clevenger
Colleen and Jeremy Cockrum
Anne Conner
Jeff Corrier
Mary Beth Crabb
Maegan Cruse and David Quesnenberry
Dorothy and Ronny Cuenod, Jr.
Jared Curless
Tonja De Sloover and Adam Hricik
Jennifer and Michael Dellinger
Stephanie and Mark Deverka
Tommy Dickey
Carolyn and Chris Dodson
Dr. Cara Downey and Mr. Jamal Bullocks
Heidi Dugan
Bonny and Joe Bob Edwards
Mark Evans
Diane Lokey Farb
Dawn Faulkner
Jennifer Finch and Hank Fuselier, Jr.
Sean Finn
Myrna Fisch
Dominique and Nick Florescu
Sherrie and Allen Gibson
Siri and Lance Gilliland
Paulina and Jorge Gomez
Nancy and Jim Gordon
Drs. Daniela and Edward Group
Perla and Jesus Guerra
Cynthia and Ben Guill
Serap and Volkan Guzel
Nini Hale
Jennifer and Richard Hancock
Julie and Victor Harris
Marian Harrison
Claudine and David Hartland
Sally and David Harvin
Drs. Jeana Hayes-Carrier and David Carrier
Nina and Edd Hendee
Marilyn and Scott Irwin
Jenna Jackson and Brendan Gilbert
Evelyn and Bob Jewell
Rosemarie Johnson
Vicsandra Jones
Anna and Gregg Jones
Kathryn Josey
Jennifer and Tom Kane
Nicole and Evan Katz
Candy and Tom Knudson
Dr. Lucy and Mr. Victor Kormeier
Shannon and Richard Kroger
Sam and Jon Lanclos
Therese Landa
Jaime Landa
Debbie Leder
Amy and Gentry Lee, II
Denise and Robert Leistern
Joseph Listengart
Cora Sue and Harry Mach
Mauney Mafrige
Joe'1 and Rocky Mafrige, Jr.
Dr. Roland Maldonado
Heather and Justin Maloney
Joanna and Brad Marks
Kimberly and Scott Martin
Bobby Martinez
Joan and John Mauel
Brandi Maxwell
Sarah McParland
John Michael
Craig Miles
Leila and Walt Mischer, Jr.
Ginni and Richard Mithoff, Jr.
Lauren and Brad Morgan
Lil and Bobby Newman
Kelly and Nick Nolan
Thomas Novosad
Linwood Olson
Kathy O'Neil and Phil Ferguson
Anna and Ron Osborn
Mrs. Catherine and Dr. Cenk Ozdogan
Carol Ann and Bob Paddock  Patti and Paul Yetter
Jane and Ed Parker  Lulu and Hugh Zhang
Billy Patterson  Rita Zhong
Susan and Will Penland, Jr.  Leslie and Andy Zizinia
Michelle and Rick Perez
Jo Ann Petersen
Elizabeth and Gary Petersen
Kristy and Rob Phillips
Jennifer and Chad Pinkerton
Katie Pipkin
Diana and Kevin Pishkar
Maya and Matt Pomroy
Sarah and Ben Powell, V
Alina and Dwight Rettig
Mel Reyna
Regina Rogers
Jess Rogers
Jessica Rossman
Kimberly and William Sanchez
Mary Kessler and Henry Sauer, III
Susanne and Tom Schieffer
Melissa and Doug Schnitzer
Judith and Roy Shaw, Jr.
Sunday Shepherd
Jill and Josh Sherman
Jade and David Shine
Dr. Caroline Simons and Mr. Justin Simons
Suzanne Sklar Simons
Lynn and Mike Smith
James Smith
Christi and Chase Smith, Jr.
Rebecca and Chad Spencer
Neil Stone
Christie and Mark Sullivan
Jenny and Einar Suter
Judy and Charles Tate
Giggy and Matt Thanheiser
Cindy and James Thorp
Patti and Tom Turner
Mary Kristen and David Valentine
Hallie Vanderhider
Lauren and Matthew Varnado
Kara and Ulises Vidal
Mollie and Kent Wallace
Bonnie and David Weekley
Dr. Bradley Weiner
Joshua Weinstein
Kelli and John Weinzierl
Nancy and Ben Wells
Rachelle Willis and Jeff Ball
Tiffany and Randall Wong
Dr. Christy Woodruff
Katie and Ben Wylie