

I. CHESTER COUNTY COMMUNITY FOUNDATION  
GRANT PROPOSAL SUMMARY SHEET

One page only. This page will be shared electronically with Grant Committee Members & Fund Advisors.

Date: October 28, 2017

Contact Information:

Organization Name: Phoenixville Area Senior Center  
Address: 153 Church Street, Phoenixville, PA 19460  
Contact E-mail: Edie@phoenixvilleseniorcenter.org  
Phone: 610-935-1515  
Website: www.phoenixvilleseniorcenter.org

Contact Name: Edie Hartman  
Contact Title: Executive Director  
Fax: 610-935-5875  
Year Incorporated: 1979

Has your nonprofit ever applied to the Community Foundation? Yes X No \_\_\_ Not Sure \_\_\_  
Has your nonprofit ever received funding from the Community Foundation? Yes X No \_\_\_ Not Sure \_\_\_  
\_\_\_ Donor Advised Fund(s) \_\_\_X\_\_\_ Fund for Chester County \_\_\_ Don't know/Not sure

Field/s of Interest:

\_\_\_ Arts, Culture & Humanities      \_\_\_ Environment/Animal Welfare      \_\_\_ Education  
\_\_\_ Health      X Human Services      \_\_\_ Religion

Organization Information:

Geographic Area Served (If not all of Chester County, specify primary Chester County regions served): The Phoenixville Area Senior Center serves seniors from the following communities in Chester County: Phoenixville, Spring City, Charlestown Township, Schuylkill Township, East and West Pikeland Township, East and West Vincent Township.

Describe Population Served and Annual Number of People Served: Currently, The Phoenixville Area Senior Center provides service to more than 1,100 individuals each year through the daily programming offered at the center. Approximately, 36% of the seniors attending the center live alone and 26% live in poverty. The remaining seniors live on modest limited incomes. The majority of the seniors that attend the center range in age from 65 to 85 years old.

Mission: The mission of the Phoenixville Area Senior Center is to serve, support, and enhance the lives of all senior citizens, 60 years and older, by providing opportunities in the way of programs and activities designed to promote active, independent, healthy lifestyles.

Proposal Summary – The center has been the focal point for senior services in the Phoenixville area for over 38 years. The center plays an important role in assisting seniors to age in place and remain in their homes. The center offers over 30 programs a week, maintains a part-time Information and Assistance Counselor on staff who can assist seniors to access programs for health insurance, prescription drug plans, heating assistance, rent rebates and transportation. The senior center also offers hot nutritious meals by serving breakfast 3 days a week and serving lunch 5 days a week. A gift of \$1,000 will provide the Community Breakfast Program with food for 4 weeks resulting in approximately 500 meals. A gift of \$2,000 will provide the seniors with an exercise instructor to conduct a class 2 times a week for 6 months. A gift of \$5,000 will provide the center with a part-time Information and Assistance Counselor for 6 months. A gift of \$7,500 will provide a Kitchen Assistant to cook breakfast and lunch for 30 weeks. The senior center has been challenged to raise \$20,000 from a local foundation who will then provide the center with a \$10,000 grant. Funds received from Chester County Community Foundation would help us meet that challenge.

If Capacity Building Proposal:

\_\_\_ Mission, Vision & Strategy    \_\_\_ Governance & Leadership    \_\_\_ Strategic Relationships  
\_\_\_ Fundraising & Development    \_\_\_ Operations    \_\_\_ Other: \_\_\_\_\_

Annual Budget \$ 404,723

87 % of budget for program expenses      7 # of Full-Time Equivalent Paid Staff  
8 % of budget for administrative expenses      20 # of Board Volunteers  
5 % of budget for fundraising expenses      127 # of Active Non-Board Volunteers  
100 % total      5,970 # of Volunteer Hours

Top 3-5 funding sources: Chester County Department of Aging Services (\$128,343); Phoenixville Community Health Foundation (\$35,000); United Way of Chester County (\$12,000)

Grant Amount Requested from CCCF: \$ \$1,000 to \$7,500

## CHESTER COUNTY COMMUNITY FOUNDATION

### II. GRANT PROPOSAL NARRATIVE

*Provide clear, concise information. 3 pages maximum.*

#### **Organization's history, goals, key achievements and distinctiveness**

*History* - The Phoenixville Area Senior Center was founded almost 4 decades ago by a group of caring individuals who recognized the need for seniors to have somewhere to gather. In the early years the senior center was a meals together program located at the First Presbyterian Church on Main Street. Seniors would gather for lunch and afternoon activities. In the mid-1980s, the senior center was able to purchase and renovate the historic Sacred Heart Social Center on Church Street.

*Accomplishments of the Organization* - The Phoenixville Area Senior Center has touched the lives of many people since its incorporation 38 years ago. Indeed this is one of its greatest accomplishments. The overall goal of the center is to be a safe haven for seniors. In the past years, the center has helped to forge many friendships and made transitioning through life's difficult times, easier for the older members of our community. People who suddenly find themselves alone because of the death of a spouse, or living with their family members have found the center a comforting place to come to during the day.

The senior center's ability to adapt to the ever changing needs of the seniors in the community and stay up to date with trends in the field, is also an accomplishment. Staff know that in order for the seniors to participate in programs, they need to be relevant and enjoyable. Both the staff and the board of the senior center welcome feedback from the seniors and take their suggestions seriously. Recent programs have included iPad and smartphone classes, current events class, the addition of the cold lunch choice, and the beginning of the Grand Families Support group that is done in collaboration with other local organizations. All of these programs came about due to the need of the seniors in our community.

Specific program accomplishments of the past fiscal year include:

- Served 7,600 noontime meals
- Served 3,775 morning meals during our Community Breakfast Program
- Daily attendance averaged 68 individuals
- Had over 16,000 visitors participate in various programs at the center
- Our Information & Assistance Counselor assisted more than 1,000 individuals (via phone and in person visits)
- Health and Wellness programs served 279 individual
- Socialization Programs served over 485 individuals
- Educational Programs served 261 individuals
- Graduated 13 individuals from the Matter of Balance Class to help seniors learn to prevent falling.
- Hosted Medicare Enrollment Sessions to assist seniors with insurance choices.
- Hosted the Better Together Block Party with 25 non-profit organizations attending and getting information about our organizations out to our neighbors.
- Hosted AARP Tax Preparers who provided free income tax preparation to 180 seniors
- Senior Stitchers made over 300 hats and donated them to neighborhood organizations such as The Clinic, Mom's House, Code Blue Ministries, Project Head Start, and Phoenixville Holiday Elves.

*General Operating Objectives for the 2017-18 fiscal year are:*

- A) 1,200 seniors will be assisted by the senior center's Information and Assistance Counselor.
- B) 250 seniors will participate in one or more activities of the senior center's Health and Wellness program.
- C) 200 seniors will participate in one or more activities of the senior center's Educational Programs.
- D) 400 seniors will participate in one or more activities of the senior center's Socialization Programs.
- E) The breakfast program will be served three mornings a week for a minimum of 48 weeks.
- F) A lunch meal will be served 5 days a week for a minimum of 48 weeks.

## **2. Funding request**

### **Description of key initiatives**

The programs and services of The Phoenixville Area Senior Center are divided into three major categories: **Nutrition** – The Nutrition Program at the senior center plays a major role in the lives of the seniors who attend the center. Many depend on the meals provided at the senior center as their main meal of the day. Seniors can come to the senior center and receive a free hot breakfast three days week and a nutritionally balanced noontime meal five days a week. The **breakfast program** is funded with contribution and funding from various foundations. It is offered to the all community members, for free, with the opportunity to make a contribution via a donation box. The breakfast program is the only free breakfast in the area and the center opens it to all members of the community not just seniors.

The **noon meal** is provided to the seniors by the Chester County Department of Aging Services (CCDAS) for a suggested donation of \$2.00 per person. Those who fall within certain income guidelines are eligible for free meals. The senior center also offers a cold lunch alternative that is prepared at the center by our staff. The center felt this alternative lunch was important to seniors who have food restrictions and could not eat the hot meal.

The center also participates in the **Commodity Supplemental Food Box Program** through the Chester County Food Bank which supplies income eligible seniors with monthly shelf stable food. The Chester County Food Bank also provides the center with weekly distributions of fresh produce and canned foods to be distributed to the seniors. Each year, at the beginning of summer, CCDAS supplies the center with **Farmer's Market Vouchers** that can be distributed to those who qualify and wish to purchase fresh produce from a market.

**Information and Assistance Counseling** – seniors can receive help with Medicare supplements, rent rebates, LIHEAP, prescription drug plans, transportation, information on home health organizations and other health care organizations. The center's I & A Counselor has APPRISE Counseling certification which enables her to advise seniors when choosing a Medicare supplement insurance. Often seniors who come to the center are challenged by the paperwork that is required for some of the programs they desperately need. The center's I & A Counselor has experience in completing this paperwork and is able to assist seniors to insure they receive the necessary services.

**Programming** – Consists of socialization, health and wellness, and educational programs.

**Socialization programs** address the overall well-being of seniors to help them stay active, involved and emotionally healthy. While some of these programs are organized, some activities are available throughout the day for seniors to join in. Groups they participate in include: arts and crafts, knitting, card games, Scrabble groups, celebrations, movie day, travel club, and volunteer opportunities.

**Health and Wellness programs** address the physical, emotional and mental health of seniors. They include grief counseling group therapy sessions (a collaboration with Tri-County Home Health and Hospice that meets monthly), blood pressure checks, and various health screenings. Also included in this group are the various exercise classes held at the senior center. The center tries to offer the seniors a wide variety of classes to meet individuals at their level of ability. Classes range from a Zumba type class to Chair Exercises.

**Educational programs** stimulate and maintain the cognitive skills of seniors. Periodically, the senior center will present special topics/events. Over the past year topics have included iPad coaching, Smartphone classes, downsizing your home, and Smart 911. The center also hosted art classes and adult coloring classes. These classes are designed to stimulate the mind and teach new ideas.

### **Specific needs and issues to be addressed**

According to the National Institute of Senior Centers, there are nearly 11,000 senior centers serving 1 million older adults aged 50+ every day. Approximately 70% of senior center participants are women. Three-quarters visit their center one to three times per week and spend an average of 3.3 hours per visit. Research shows that compared with their peers, senior center participants have higher levels of health, social interaction and life satisfaction than their counterparts who do not attend.

The 2015 United States of Aging Survey, conducted by the National Association of Area Agencies on Aging (n4a), the National Council on Aging (NCOA) and UnitedHealthcare, examined older American's perspectives on aging and what communities can do to better support an increasing, longer-living senior population. In this survey, it was found that Older Americans' top concerns were: Maintaining their physical health (40%), Memory loss (35%) and maintaining their mental health (32%).

Keeping a positive attitude and exercising regularly are some of the best ways identified by older adults to stay mentally sharp. Seventy-two percent of professionals agree with older adults on the importance of regular exercise to stay mentally sharp, and nearly 6 in 10 say maintaining an active social life is also a priority to maintain mental fitness. The

Phoenixville Area Senior Center offers 3 different exercise classes that meet 2-3 times a week. These exercise classes focus on the needs of older adults at various stages of ability. The classes provide both the needed physical exercise and a social outlet for the participants.

This same survey showed that older adults are looking to their communities for support as they age, so they can continue living in their homes as long as possible. In this group, 58% had not changed residences in more than 20 year. Additionally, 75% intended to live in their current home for the rest of their lives. The Phoenixville Area Senior Center helps older adults in the community to learn about safety in the home, meet with various home healthcare professionals, and provides resources to participants for maintaining their homes.

### **Organizational impact if initiative is undertaken**

The Phoenixville Area Senior Center, like many non-profit organizations, continues to be affected by both the economy and the Commonwealth's budgeting decisions. The Senior Center receives about a third of the budgeted income from the Chester County Department of Aging Services. The remaining two-thirds of the budget depends on grant writing, annual appeal donations, fundraising events and the small fees we charge for membership and activities. Each year the center struggles to meet its budget, while keeping expenses to a minimum. The Board of Directors and staff at the center work hard to meet our financial obligations, fully aware that failure would have a devastating effect on the senior community in Phoenixville.

The borough of Phoenixville and the surrounding area is growing and new housing is being developed. Having met with Borough officials, the senior center staff and board have become aware that Phoenixville Borough has plans to increase senior housing by over 500 units, with additional housing units planned for nearby townships, all within the service area of the senior center. This is in addition to the over 700 general residential units being developed in the downtown area. The center will become the resource where many older adults will come for assistance. The center has started to prepare for the influx of seniors to our area, but needs the assistance and support of the community. A grant to the Phoenixville Area Senior Center now, will help us maintain our current programs and plan for future growth.

### **Activities to implement the initiative.**

*Action Plan* - In order to meet our stated objectives, the following activities will take place on a year-round basis:

A) Information and Assistance Counselor will be available at least 18 hours a week. Schedule will be posted in the newsletter and at the center.

B) Strategies for the Health and Wellness objective include (but not limited to):

Stretch & Flex Classes: an hour class, twice a week for 46 weeks, avg. class 12 per class

Chair Toning: an hour class, three times a week for 46 weeks, avg. class 8 per class

Strength Training: an hour class, three times a week for 46 weeks, avg. class 8 per class

C) Strategies for the Educational Program objective include (but not limited to):

Educational Workshop: 1 hour class x 1/month x 12 months, avg. class 10 people

Drawing Class: 2 hours session x1/weekly x 8 months, avg. class 8 people

D) Strategies for the Socialization objective include (but not limited to):

Birthday Socials 2 hours x 1/month x 12 months, avg. 60 people

Table Games: 2 hours x 1/week x 12 months, avg. 15 people

Duplicate Bridge: 4 hour session x1/week x 48 weeks, avg. 40 people

E) Breakfast Program will be scheduled three days a week for 48 weeks, avg. 35 people per meal

F) Lunch will be offered 5 days a week for 48 weeks, avg 35 people per meal

Methods of evaluation include attendance records and reports through the center's database, the Copilot system. Members scan their key tags as they enter the building and using the touch screen record the meals and activities they are attending for the day. This system can also advise members when surveys are required. Staff use surveys to evaluate programs and instructors/presenters.

Information and Assistance contacts are recorded by the counselor and tracked for any necessary follow-up.

The staff at the center also garner direct feedback through conversations with members. Staff will often sit and talk with the seniors to get their feedback on meals, activities and speakers. The Board of Directors at the Phoenixville Area Senior Center is a working board. One of the standing committees of the board is the Program Committee which works with the appropriate staff to evaluate and make recommendations for new programs.

### **III. ATTACHMENTS**

*E-mail this support information:*

1. Copy of 501 (c) (3) federal tax-exempt letter

See separate E-mail attachment.

## Attachment #2 List of Board of Directors, with their affiliations

### PRESIDENT

**Lee Deveney**

Retired Teacher  
Fundraising Experience  
7 years of service  
Executive Committee  
Finance Committee  
Chair - Fund Development

**Mary M. Austin**

Vice President, Health Services  
NewCourtland Senior Services  
M.S.N., R.N., N.H.A.  
Less than 1 year of service  
Finance Committee  
Governance

**Kathy Johns**

Retired Grant Writer  
Less than 1 year of service  
Governance Committee  
Fund Development

**Nefri L. Rosa**

Assistant Branch Manager - BB&T  
2 years of service  
Development Committee  
Program Committee

**Thomas J. Wright**

JBS Supply - Sales  
Less than 1 year of service  
Facilities Committee  
Governance Committee

### VICE-PRESIDENT

**Paul Slaninka**

Retired Teacher,  
Past President Phoenixville  
Area School Board  
Business experience  
10 years of service (final year)  
Executive Committee  
Chair - Facilities Committee

**Dorothy Brower**

Office Manager, Bookkeeper, Insurance Agent  
Magis Insurance Group, LLC  
Less than 1 year of service  
Program Committee  
Fund Development Committee

**Allen Kramer**

Senior Vice President/Manager Retail Lending  
2 years of service  
Program Committee  
Finance Committee  
Audit Committee

**Mary Ellen Sierzega**

Gateway Pharmacy Manager  
4 years of service  
Program Committee  
Fund Development Committee

**Pam Zahorchak**

Realtor-Century 21 Norris  
9 years of service (final year)  
Chair - Governance Committee  
Fund Development Committee

### SECRETARY

**Ken Buckwalter**

President/CEO Buckwalter Galleries, Ltd.  
Marketing experience  
Three years of service  
Executive Committee  
Finance Committee  
Facilities Committee

**Thomas Gene Grubbs**

Retired Teacher and Nursing Assistant  
Less than 1 year of service  
Fund Development Committee  
Program Committee

**Dee McClimon**

Realtor-Century 21 Norris  
9 years of service (final year)  
Chair - Program Committee  
Governance Committee

**Peter Urscheler**

Senior Marketing Consultant-235 Bridge  
1 year of service  
Program Committee  
Fund Development

**Page M. Zettlemyer**

Director of Annual Giving and Donor Engagement  
Presby's Inspired Life  
Less than 1 year of service  
Program Committee  
Fund Development Committee

### TREASURER

**Richard H. Gherst II**

Partner (Retired)  
PricewaterhouseCoopers LLP  
Financial experience  
Five years of service  
Executive Committee  
Finance Committee-Chair  
Audit Committee

**Sharon Gubanich**

Bookkeeper - Azzurro, Inc.  
Less than 1 year of service  
Finance Committee  
Fund Development Committee

**Jeanette Petrucelli**

Realtor-Century 21 Norris  
8 years of service  
Finance Committee  
Governance Committee

**Ronald L. Williams**

Partner - Fox Rothschild LLP  
5 years of service  
Facilities Committee  
Governance Committee  
Audit Committee

**Moriah Hall**

Manager  
Less than 1 year of service  
Program Committee  
Governance Committee

3. Most recent annual report and financial statement, audited if available

See separate email attachment

4. Itemized organizational operating budget with actual results for prior fiscal year and current fiscal year to date

See separate email attachment

6. Current strategic plan. If your nonprofit does not have a current strategic plan, explain why.  
See separate email attachment

*Note: Philanthropy Network Greater Philadelphia Common Grant Application may be submitted with CCCF  
Summary Sheet.*

*Visit [www.chescocf.org](http://www.chescocf.org) for an electronic version of this application.  
E-mail applications are strongly encouraged.*

E-mail completed proposals to [grants@chescocf.org](mailto:grants@chescocf.org)  
Attn: Beth Harper Briglia, Vice President of Donor Services & Grantmaking  
Chester County Community Foundation

Please call or email Beth Harper Briglia at 610-696-8045 or [beth@chescocf.org](mailto:beth@chescocf.org) if you have any questions.