

I. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL SUMMARY SHEET

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

Note: If Philanthropy Network of Greater Philadelphia's Common Grant Application is used, the Community Foundation's Summary Sheet **MUST** accompany application.

To obtain an electronic version of this application, visit www.chescocf.org

Date: 5-5-2018

Contact Information

Organization Name: Friends Home in Kennett Executive Director Name: Christine McDonald
Address: 147 W. State St., Kennett Square, PA 19348 Exec. Director E-mail: cmcdonald@fhkennett.org
Phone: 610-444-2577 Bd. Chair Name: Deborah Brumbaugh(clerk)
Website: www.fhkennett.org Primary Contact Name: Wright Horne
Year Incorporated: 1898/1957 Primary Contact E-mail: whorne@fhkennett.org

Has your nonprofit ever applied to the Community Foundation? Yes No Not Sure

Has your nonprofit ever received funding from the Community Foundation? Yes No Not Sure

Donor Advised Fund(s) Fund for Chester County Don't know/Not sure

Field/s of Interest:

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

Organization Information:

Geographic Area Served (If not all of Chester County, specify primary Chester County regions served):

All of Chester County

Describe Population Served and Annual Number of People Served:

Friends Home in Kennett serves older men and women of modest means. Our current average age is 89. In 2017 we served 124 Independent Living, Personal Care and Skilled Nursing residents. This number continues to increase because of our short-term respite and give-it-a-try programs.

Mission:

Friends Home in Kennett (FHK) is a non-profit organization dedicated to providing quality care in a homelike atmosphere for older men and women of modest means. We encourage independence and we respect the individuality and dignity of all in keeping with the values of the Religious Society of Friends.

Proposal Summary:

Friends Home asks for a grant to help support our important and successful Resident Assistance Program, which now includes residents in our skilled nursing unit who previously had not been covered. The Program was established in 2014 to help residents stay here when their financial resources have become depleted. While our monthly rates are among the most affordable in Chester County, many of our residents need financial assistance even though they have saved diligently and planned carefully because of loss of home value or reduced return on investments, or they simply outlive their financial resources due to longer lifespans. The Program helps answer the question, "Where will I go now?"

Annual Budget \$ 3,604,822 61 # of Full-Time Equivalent Paid Staff

82 % of budget for program expenses 10 # of Board Volunteers

16 % of budget for administrative expenses 65 # of Active Non-Board Volunteers

2 % of budget for fundraising expenses 980 # of Volunteer Hours

100 % total

Top 3-5 funding sources - 2017:

Longwood Foundation, Inc. \$75,000, Welfare Foundation \$50,000, Crystal Trust \$41,470, Quaker Buildings and Programs \$21,494, Friends Foundation for the Aging \$19,000

Grant Amount Requested from the Community Foundation: \$10,000

II. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

1. Organization's history, goals, key achievements and distinctiveness

History

Friends Home in Kennett was founded in 1898 by members of the Religious Society of Friends (Quakers) in response to the need for a home for elderly Friends, and operated as a boarding home for many years. The Home began offering personal care services in the 1970s and skilled nursing care in 1980 to better serve the community's needs. Today, Friends Home in Kennett continues to be guided by Quaker values and serves older adults regardless of their religious affiliation.

Goals

- Build and maintain a program to provide financial assistance to residents who have outlived their financial resources
- Continue to assess and respond to the community's need to provide services for older adults
- Stay true to our tradition and history of service to community members of modest means while keeping current with innovations in providing compassionate care, such as campus-wide programming for those with cognitive difficulties.

Key Achievements

- Maintaining a high quality of care that consistently receives high marks from the PA Department of Health and the PA Department of Human Services during their annual unannounced surveys
- Recruiting, retaining and continued training of a professional, experienced and compassionate staff
- Providing a more modest alternative for senior living for those who prefer a simpler lifestyle
- Instituting Montessori Inspired Lifestyle for those in cognitive decline that tailors resident care in answer to the question, "How can we connect with the person who is still there?"

Distinctiveness

Friends Home in Kennett is an independent living and personal care residence, with a separate skilled nursing unit, for older adults who prefer a simpler lifestyle. Our historic buildings and our central location in Historic Kennett Square give our programs the homelike feel and casual comfort for which the Home is known. The relatively small size of our campus allows our staff to serve as a "community of care" to respond more intimately with residents.

2. Funding request

• **Description of key initiatives**

A Resident Assistance Program was established in 2014 to help residents whose resources have been depleted to remain here and avoid a move to another facility, a move that typically proves to be traumatic. The Program has recently been extended to cover residents in our skilled nursing unit. The Program's key initiatives include:

- Assessment of each resident's finances on admission and then also on a regular basis, allowing us to intervene with an offer of support before a crisis point
- Communicating regularly with residents and their families about their financial and care needs, and making sure they know of the Resident Assistance Program
- Strengthening the Home's fundraising efforts directed to the Resident Assistance Program

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

It is a challenge for older adults and their families to find quality services that are priced somewhere between the lowest, government-subsidized rates and the highest, "buy-in" rates of continuing care retirement communities. We know that monthly and per diem rates for Personal Care and Skilled Nursing Care vary greatly, and that many senior living communities are priced so high that middle- and low-income people cannot afford

them. Some other facilities are Medicare/Medicaid certified and may be operated by a County or State agency. Friends Home in Kennett is a private-pay facility, which receives no state or federal funding and offers independent living and personal care rates among the most affordable in Chester County.

Many older adults who spent their lives planning and saving for retirement live longer than their plans had envisioned. While happy to be enjoying additional years of life with family and friends, they struggle to manage their finances to sustain quality of life. Some have experienced unanticipated medical complications and their associated costs. Market conditions beyond their control – declining home values and return on investment – have further reduced their ability to afford quality care services.

The Guide to Retirement Living lists monthly cost ranges for 18 of the 49 personal care homes in Chester County, showing an average range of \$3,790 to \$5,121 per month. Friends Home's personal care rates are below this average, at \$3,250 to \$3,980 for standard apartments. Cost comparisons between personal care homes can be difficult to make since each one offers slightly different care packages. For example, while many charge an additional fee for laundry service, Friends Home does not.

Friends Home in Kennett fills the need for affordably priced personal care in Chester County by offering these rates, and by inviting residents to apply for financial assistance when needed. Even as the cost of services for the elderly in our community continues to rise, Friends Home in Kennett remains committed to carrying out its mission of serving older men and women of modest means.

- **Organizational impact if initiative is undertaken**
 - **How will this grant enhance your organization's capacity?**

Grants to the Resident Assistance Program increase Friends Home in Kennett's capacity to serve residents whose funds deplete, preventing disruptive moves to government subsidized facilities.

- **How will this increase in organizational capacity be measured?**

We carefully track discharge statistics, including date, reason and place the resident moves to after leaving FHK. We have experienced a dramatic decrease in discharges that are due to lack of funds, and we anticipate an even further reduction as a result of increased capacity to prevent such moves, especially since we now have extended the Program to cover our skilled nursing unit.

- **Activities to implement the initiative. Please include a description of the expected activities; timeline and costs to implement the initiative.**

Determination of eligibility for support from the Resident Assistance Program is made using Board-approved policies and guidelines. Periodic review of these policies and guidelines ensures proper use of funds, as do periodic reviews of each resident's income and assets.

Following the submission of an application for residency by a potential resident, our Admissions and Marketing Director reviews all social, medical and financial documentation to ensure that FHK can accommodate the potential resident's needs. Social and medical information is reviewed with the Personal Care Director or the Director of Nursing, and financial information with the Executive Director.

Potential residents must have the financial ability to pay for a stay of three years. Because of the vagaries of the economy, and thanks to new medical discoveries that extend healthy living, the possibilities of depleting one's funds are on the increase. FHK staff meets with the resident and/or with family members to determine need and to complete applications to the Program.

Timeline: The Resident Assistance Program is an ongoing program

Costs: With budgeted transfers of \$80,000 from our own operational budget, and if all grant proposals are funded, the Program will provide \$110,000 in assistance to residents this year (2018), up from \$53,000 in FY2014. The 2019 Program budget will increase in response to both resident needs and funds raised.

- **Why it is important to fund this now**

If we do not fully fund the Resident Assistance Program, the possibility looms that some residents will have to move out. We did not meet our fundraising goals in 2017, and made up the difference out of operational revenues. We have committed to the needs of current residents, we will continue to seek funding, and we also will need to be ready for new demands on the Program - always a concern.

3. How impact and results will be demonstrated

The Resident Assistance Program will be successful by achieving the following:

- Provide financial assistance for monthly room and board, and care costs for 8-10 residents for a period of at least one year. Number served will depend on the need of residents currently in the program, and the amount of assistance available.
- Prolong the length of stay of residents in both the Personal Care home and the skilled nursing unit
- Ensure income diversity, through fundraising, grants, and investment income, to support the Program's assistance to residents

III. ATTACHMENTS

E-mail or mail this support information

1. Copy of 501 (c) (3) federal tax-exempt letter
2. List of Board of Directors, with their affiliations
3. Most recent annual report and financial statement, audited if available
4. Itemized organizational operating budget with actual results for prior fiscal year and current fiscal year to date
5. If capacity building initiative, itemized budget (including external consultant's proposal, if applicable)
6. Current strategic plan. If your nonprofit does not have a current strategic plan, explain why.

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E-mail completed proposals to grants@chescocf.org

Please contact Kevin Baffa or Beth Harper Briglia at (610) 696-8211 or grants@chescocf.org if you have any questions. Thank you.

Chester County
COMMUNITY FOUNDATION
*Connecting people who care with causes that matter,
so their legacies make a difference.*