

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: October 11, 2017

Contact Information

Organization Name: Surrey Services for Seniors
Address: 60 Surrey Way, Devon, PA 19333
Phone: 484-321-6101
Website: SurreyServices.org
Year Incorporated: 1981

Executive Director Name: Robert M. Madonna, President & CEO
Executive Director E-mail: bobmadonna@surreyservices.org
Board of Directors Chair Name: Maureen Brennan-Miller
Primary Contact Name: Kathleen Sanger
Primary Contact E-mail: KSanger@SurreyServices.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):

Surrey's primary service areas are Chester and Delaware Counties.

Describe Population Served and Annual Number of People Served:

The typical Surrey client is a single, widowed or divorced woman over age 75 who is living alone. Approximately 75% of the 7,700 people served annually, most age 65 and older, are women and are equally distributed between Chester and Delaware Counties.

Mission: Surrey's mission is to help older adults live with independence and dignity and to continue as active members of the community.

Proposal Summary: Surrey requests a grant for general operations to support:

- Programs and services provided to seniors at its facilities, such as the Center for Healthy Living in Devon;
- Home based services, such as bathing, cooking, and laundry, that enable people to stay in their homes as long as possible;
- Services impacting quality of life such as transportation to medical appointments, shopping and Surrey facilities, Meals on Wheels, and minor home repairs, such as home modification projects.

If Capacity Building Proposal, the focus is: N/A

Mission, Vision & Strategy Governance & Leadership Strategic Relationships
 Fundraising & Development Other: _____

Annual Budget \$ 4,943,734

<u>80</u> % of budget for program expenses	<u>78</u> # of Full-Time Equivalent Paid Staff
<u>11.8</u> % of budget for administrative expenses	<u>24</u> # of Board Volunteers
<u>8.2</u> % of budget for fundraising expenses	<u>1,357</u> # of Active Non-Board Volunteers
<u>100</u> % total	<u>70,000</u> # of Volunteer Hours

Top 3-5 funding sources:

1. Anonymous individual donor; 2. Pew Charitable Trusts; 3. Gala and Main Line Antiques Show; 4. United Way of GPSNJ; 5. The Philadelphia Foundation

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

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

Surrey Services, established in 1981, serves approximately 6,800 seniors, with an estimated 700 low income, from four locations in Devon, Media, Havertown and Broomall. Surrey helps older adults in Chester, Delaware and Montgomery counties to live with independence and dignity and to continue as active members of the community. Surrey provides a full range of services to thousands of seniors from the “younger-old” to the frail. Surrey is the only non-profit organization in the region providing the combination of center-based services and comprehensive home care services and is accredited by the National Institute of Senior Centers and the Pennsylvania Association of Nonprofit Organizations.

Surrey was founded on a “neighbor helping neighbor” model and continues to be guided by this principle. Our organization was the first in the region to recognize that seniors sharing their extraordinary life and work experiences can make a meaningful impact on how we shape and deliver services designed to provide a more holistic and healthier approach to growing older. As our senior population, particularly in this region, grows exponentially, we continue to capitalize on the knowledge, expertise and compassion of our seniors by offering them a purposeful connection to others thus benefiting all concerned.

Faced with a tremendous opportunity, as more and more people are living longer and better lives, Surrey is dedicated to developing the right mix of activities and services to realize the aspirations and meet the needs of this growing and changing older population. In 2016-17, Surrey's staff and volunteers provided 70,747 hours of home services, 15,807 rides to/from medical appointments, our centers and essential errands such as grocery shopping, in addition to 47,817 home delivered meals and more than 34,000 nutritious meals at our four sites.

2. Funding request

Description of key initiatives

Surrey offers programs and services that enable older adults to improve their physical and mental health and wellness and nutrition through programs encouraging lifelong learning, volunteerism and socialization. The state of the art 17,000 square foot Center for Healthy Living opened in Devon in 2014 and features a contemporary fitness center, a dining cafe and modern kitchen facility, a dental clinic, technology labs and conference rooms. A mental health resource program, launching this fall, is facilitated in partnership with NAMI PA, Main Line, a chapter of the National Alliance on Mental Illness and The COAD Group (formerly Chester County Council on Addictive Diseases).

Home-based support services are provided to ensure the comfort and safety of homebound members, offering a comprehensive approach to managing the changing needs of seniors and their family members. This approach reduces family stress and allows Surrey's seniors to live as safely and independently as possible, while achieving their best quality of life. Last year, 384 clients benefitted from 70,747 hours of home care provided by 113 Surrey employees including 14,872 hours of home care provided to clients receiving subsidies.

Community-based supportive services such as Meals on Wheels, transportation and home maintenance/repair allow Surrey members to continue to live independently while providing seniors with opportunities for volunteerism and engagement in the community.

Specific to Chester County residents is the lunch program at Surrey Devon. 15,500 meals are served to members and seniors at the modest price of \$4.00/lunch. The cost to Surrey for the food alone exceeds \$7.00 and when salaries, equipment, maintenance, and supplies are added in, the cost is approximately \$9.00/meal. By not passing on the additional \$5.00 in cost to our members, they can afford nutritionally balanced meals in a social setting. Our Chef likes to say that his “guests” come for the food and stay for the programs; he is right. Many who enjoy eating at the Surrey Devon café use the opportunity to attend a class before or after lunch. This active engagement in a social setting is a key component in reducing isolation and depression.

Specific needs and issues to be addressed

Surrey programs and services aim to reduce social isolation and depression, increase independence, and improve the quality of life for seniors of all income levels and their families. Although poverty exists in every community, the affluence of suburban Philadelphia often obscures the need, placing a stigma on those who require help.

Currently there are 74,400 individuals 65 and older living in Chester County and nearly 3,000 seniors are living below the Federal Poverty Level (\$11,880 annual income). According to census figures, in Chester County while the overall population grew 15% in the 10-year period of 2000 to 2010, the percentage of seniors within the county’s population grew dramatically faster during the same time frame. The census data shows a 40% growth rate among those over 55; over twice the rate of the state (17%) and higher than the U.S. (30%).

Approximately 75% of all Surrey members are women and our members are equally distributed between Chester and Delaware Counties. The profile of a typical Surrey member or client is a single, widowed or divorced woman over age 75 who is living alone. The majority of our seniors want to stay in their homes, near their friends and in the community where they lived, worked and raised their families. Approximately 52% of older adults in our service area, or 124,759, live alone. According to AARP, nearly 90% of people over the age of 65 want to remain living in their own homes for as long as possible.

Another program that relies on subsidies is home care services. Last fiscal year, \$112,037 was made available to eligible seniors by application and was provided on a sliding scale. Information provided by our members and clients indicates that approximately 20% are classified as low income and are eligible for subsidies. It is believed that many more Surrey members and clients would classify as low income if they felt comfortable revealing their income.

Organizational impact if initiative is undertaken

How will this grant enhance your organization’s capacity? N/A

How will this increase in organizational capacity be measured? N/A

Activities to implement the initiative. Please include a description of the expected activities; timeline and costs to implement the initiative. If external consulting services are required, include the anticipated costs and expertise of the consultants to be hired.

Programs offered at Surrey facilities. *Please note: Costs provided with personnel expenses excluded.*

- Lifelong learning and fitness and wellness classes; 2,604 individuals enjoyed 56,721 experiences (Year-long \$84,669)
- Cafes serving 34,000 lunches at Surrey four sites (Year-long \$77,062)
- Information and referral provided for all inquiries received at Surrey via phone or walk-ins. Outbound calling to all Surrey members asking if they need anything/is there a way we can help. Dental services, free services for low income seniors through a partnership with Community Volunteers in Medicine (Year-long \$78,261)
- Mental Health Resource program to effectively promote awareness and connect older adults to mental health resources and services in Chester and Delaware counties. (Launched in September 2017 \$9,490)

Home Based Services

- Home Care Services includes personal care, social companions, house cleaning, aging life care management, RN care management, short term RN care, and personal finance management; 70,747 hours provided to 384 individuals by 113 Surrey Direct Care employees (Year-long \$124,530)

Community Based Services

- Meals on Wheels provides 47,817 home delivered meals via a partnership with Meals on Wheels affiliates (Year-long \$71,604)
- Minor home repairs and yard work; 420 projects completed with \$66,518 spent on home modification projects.
- Transportation; 15,807 rides provided to Surrey members enabling them to get to activities such as medical and personal care appointments (Year-long \$67,101)
- Volunteer opportunities; 65,074 hours contributed by 1,357 volunteers for a value of \$1,554,620. (Year-long, expenses incurred through salaries only)

Why it is important to fund this now

In Chester County, the overall population grew 15% in the 10-year period of 2000 to 2010, while the percentage of seniors within the county's population grew dramatically faster during the same time frame. The census data shows a 40% growth rate among those over 55; over twice the rate of the state (17%). Last year, 7,700 seniors, equally divided between Chester and Delaware Counties, benefitted from Surrey's programs, services and publications while the number of seniors in the service area continues to grow.

3. How impact and results will be demonstrated

Surrey annually administers the standardized survey from the Florida Department of Elder Affairs Senior Center Evaluation Toolkit and the Surrey Home and Community Services Survey

to document member outcomes. Based on trends in responses, Surrey anticipates that, of seniors completing the survey:

- At least 85% will report greater socialization and interaction with others.
- At least 90% will report improved physical health.
- At least 90% will report an improved outlook on life.
- At least 90% will report the ability to maintain their independence.