

GRANT PROPOSAL GUIDELINES

The Chester County Community Foundation connects people who care with causes that matter, so their philanthropy makes a difference now and forever.

- The Community Foundation is a collection of Funds: Field of Interest Funds + Donor Advised Funds.
- All Community Foundation Funds accept this grant application form.

Proposals submitted by nonprofits will be considered for 2 types of grants:

1) FIELD OF INTEREST & DONOR ADVISED FUNDS

- ◇ Proposals received **any time throughout the year** are eligible for funding consideration from the Foundation's Field of Interest Funds & Donor Advised Funds.
- ◇ Grant **awards** typically range from **\$500 - \$7,500**.
- ◇ Grant decisions are made **intermittently** throughout the year, as Fund Advisors desire.
- ◇ Proposals are **electronically shared** with Fund Advisors to assist them in making grant decisions.
- ◇ **General operating** grants are encouraged. Nonprofits should be specific about their mission, goals, and measurable outcomes.
- ◇ Grants **focus on Chester County** causes and issues, but **are not limited** to Chester County.
- ◇ Grants may be made to charitable nonprofits working in **all fields of interest** including arts, culture and humanities; education; community improvement; environment; religion; health; and human services.

2) FUND FOR CHESTER COUNTY CAPACITY BUILDING INITIATIVE

- ◇ The goal of the Community Foundation's capacity building grantmaking is to **strengthen the effectiveness of nonprofit organizations serving the Chester County region**.
- ◇ Capacity building proposals received by **September 15** annually will be eligible for this special grant initiative.
- ◇ Capacity building projects should strengthen a nonprofit, in areas including:
 - Mission, Vision & Strategy
 - Governance & Leadership
 - Strategic Relationships
 - Fundraising & Development
- ◇ Grant **awards** range from **\$500-\$5,000**.
- ◇ NPO's with budgets \$ 750,000 or less preferred
- ◇ Grant monies are distributed by **February**.
- ◇ Nonprofits must be **located in and serve Chester County** to receive a grant from this special initiative.

- A proposal is considered "complete" when the Chester County Community Foundation has confirmed receipt of the **Grant Proposal Summary Sheet, Narrative and Attachments**.
 - Proposals are shared electronically online with Fund Advisors and the Grants Committee.
 - The electronic form is available at www.chescocf.org.

Per IRS regulations, applicants

- must be charitable, tax exempt organizations with 501(c)(3) certification
 - cannot be individuals
- **E-mail proposals are strongly encouraged to grants@chescocf.org**
 - Receipt will be confirmed by e-mail.

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

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 June 11, 2018

Contact Information

Organization Name: Phoenixville Area Senior Center Executive Director Name: Julie Gaudan
Address: 153 Church St, Phoenixville, PA 19460 Executive Director E-mail: julie@phoenixvilleseniorcenter.org
Phone: 610-935-1515 Board of Directors Chair Name: Ronald Williams
Website: phoenixvilleseniorcenter.org Primary Contact Name: Julie Gaudan
Year Incorporated: 1979 Primary Contact E-mail: julie@phoenixvilleseniorcenter.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): Boroughs of Phoenixville and Spring City, Townships of East & West Pikeland, Schuylkill, Charlestown, East & West Vincent.

Describe Population Served and Annual Number of People Served: The Phoenixville Area Senior Center serves more than 1,200 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. Seniors that attend the center range in age from 65 to 85 years old.

Mission: To serve, support and enhance the lives of all senior citizens, 60 years of age and older by providing opportunities in the way of programs and activities designed to promote active, independent, healthily lifestyles.

Proposal Summary: The focal point for senior services in the Phoenixville area for almost 40 years, the Center assists seniors to age in place and remain in their homes. The state of Pennsylvania was ranked 8th in the nation in 2010 with 2.9 million over the age of 60. By 2020 that number is expected to have increased by 25%. The Phoenixville Area Senior Center must complete a thorough needs assessment and strategic plan to address this growing population.

If Capacity Building Proposal, the focus is:

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

Annual Budget \$ _____	<u>6</u> # of Full-Time Equivalent Paid Staff
<u>76</u> % of budget for program expenses	<u>17</u> # of Board Volunteers
<u>15</u> % of budget for administrative expenses	<u>112</u> # of Active Non-Board Volunteers
<u>9</u> % of budget for fundraising expenses	<u>5893</u> # of Volunteer Hours
<u>100</u> % total	

Top 3-5 funding sources: Chester County Department of Aging (\$178,345), Phoenixville Community Health Foundation (\$35,000), WW Smith Charitable Trust (\$11,000) Royersford United Methodist Church (\$10,000)

Grant Amount Requested from the Community Foundation: \$ 5000

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: The Phoenixville Area Senior Center is the focal point for senior services in Northern Chester and Southern Montgomery County (Greater Phoenixville/Spring City/Royersford/Collegeville area). Starting with meals and dances, the Center was established almost 40 years ago. The Center plays an important role in assisting seniors to age in place and remain in their own homes.

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

In a culture centered on youth and the young, the Senior Center is the one place in our community focused on the **"60 and better"** demographic. A one stop shop for seniors; meals, exercise and information that focuses on the seniors FIRST. The Baby Boomers have entered this demographic and are just starting to learn how much The Center can offer. This year the Center offers a variety of programs once a month via a "Second Thursday" programing and looks to expand the offerings as demand increases.

Goals: The goal of the Phoenixville is to continue as a gateway for seniors in our community to access services, find an inviting place to gather, and an access point for multiple services in one location. The Phoenixville Senior Center has been the "best kept secret in Phoenixville." The Center has great programs, it needs to raise awareness and attract the younger seniors.

Achievements: The Center serves over 1200 individuals each year from 60 years of age to 101 years young. The Center's Nutrition Program helped 530 participants last year over 12,000 times to manage food insecurity and nutritional needs. Last month, an average of 82 people a month ate a meal, took a class or exercised at the Center.

2. Funding request

• Description of key initiatives

No demographic change in the next few years will have as much significance as the Baby Boomers reaching retirement. Coined the "Silver Tsunami", this group is not expected to follow the pattern of former generations. Senior Centers that maintain the status quo will not thrive or survive. The Phoenixville Area Senior Center has not had a professional Strategic Plan for at least 10 years. In order to support a new Strategic Plan, the Center requires a current SWOT (Strength, Weaknesses, Opportunities and Threats) analysis and an in depth needs assessment before it can craft a quality Strategic Plan.

• Specific needs and issues to be addressed

The Phoenixville Area Senior Center needs to conduct a thorough needs assessment and complete a new Strategic Plan. New board leadership and the offer of a new building shone light on the possibilities and opportunities that the Center is missing. The leadership was not equipped to know if the new space being offered was adequate to the future needs of the Center. When circumstances changed, the Board and Center leadership determined that the Center's future demanded a thorough and professional analysis.

The Board and Executive Team realize that continuing with the status quo will lead to a slow decline as the current members age and no longer attend the Center. The consensus is that Baby Boomers will not be attracted to the current center as it exists today i.e. “your father’s Senior Center”. The leadership team needs to understand what our future client base really wants and what the Center needs to do to meet those requirements.

- **Organizational impact if initiative is undertaken**

- How will this grant enhance your organization’s capacity?**

- The Phoenixville Area Senior Center will be able to determine future needs and whether the current building can be modified to adequately meet those needs or if a new site is required. Based on the needs assessment the Center will either improve the existing site or begin searching for a new home. The proposed process will engage PSC leadership in the planning process final documents.

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

- Increased attendance at the Center will be a basic outcome of improvements made at the Center as a result this study.

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. This type of assessment will gather and review internal and external documents, survey or interview key informants that include, staff, funders, area leaders, consumers and consumers -Information will be gathered to evaluate area social assets, current best practices of centers of similar size, and a competitive analysis. Internal assessment will look at funding and operational policies and resources.

See attachment for consultant’s plans. Additional funding will be required to complete this and the Strategic Planning process.

- **Why it is important to fund this now?** The leadership team at the Center and the Board of Directors have changed In the course of reviewing and updating, Board leadership realized that the Center’s goals needed to be refined. We had been trying to help all seniors in general from 60 to 101. One size does NOT fit all. The Center needs to address the “Silver Tsunami” of Baby Boomers who don’t want their parents’ senior centers. Finding out what the Baby Boomers want and need will be key to success in the future.

3. **How impact and results will be demonstrated?** This project will result in a SWOT and needs assessment that will be used to produce a Strategic Plan that will move the Center into the future exceeding expectations and growth. A quality Strategic Plan will motivate leadership, participants and funders.

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.

If Philanthropy Network of Greater Philadelphia's Common Grant Application is used, the Community Foundation's Summary Sheet MUST accompany application. Available at www.chescocf.org

E-mail completed proposals to grants@chescocf.org

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

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CAPACITY BUILDING GRANT PROPOSALS

“Capacity building is whatever is needed to bring a nonprofit to the next level of operational, programmatic, financial, or organizational maturity, in order to more effectively and efficiently fulfill its mission.” *National Council of Nonprofits*

Capacity building initiatives may include (but are not limited to) projects which address:

- **MISSION, VISION & STRATEGY:** Organizational Assessment; Strategic & Business Planning
- **GOVERNANCE & LEADERSHIP:** Board Development; Executive Transition/Succession Planning; Leadership Development; Staff Training & Professional Development
- **STRATEGIC RELATIONSHIPS:** Coalition Building; Collaboration; Mergers & Acquisitions; Strategic Restructuring
- **DEVELOPMENT:** Donor Identification, Cultivation, Development & Stewardship; Development Campaigns (Annual, Capital, Planned Giving, Major Gifts); Earned Income Development; Social Enterprise Feasibility & Development; Marketing, Branding & Communications
- **OPERATIONS:** Business Continuity Planning; Financial Management; Human Resources; Volunteer Management; Industry Certification; Risk Management; Technology Improvements

Capacity Building Grants have been used to fund the following initiatives:

- **Strategic Analysis, Plan development and implementation**
- **Technology enhancements, including donor tracking and development software**
- **Website Design & Development**
- **Marketing Materials**
- **Development of Financial management and control systems**

Please Note: @99% of the grants issued by the Community Foundation are through the generosity of the Fund Advisors who created donor advised funds. @\$2+ million is granted annually to nonprofits in Chester County and beyond.

The Community Foundation has a small pool of unrestricted funding to support capacity building initiatives. A separate grant proposal (using the same application format) must be submitted to be considered for a capacity building grant.

To inform donors of grant proposals that have been received by the Foundation, the grant proposal cover sheet and narrative are posted on the Community Foundation’s website with a link to the nonprofit’s website. Quarterly, our donors are mailed a written list of all grant applications received, and directed to the grant proposal webpage so they can review active grant proposals. Community Foundation staff also discuss active grant proposals during donor meetings, when donors are interested in the causes served by the nonprofit.

E-mail completed proposals to grants@chescof.org

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