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 September 14, 2019

Contact Information
Organization Name: Coatesville Area Senior Center
Executive Director/CEO Name: Bill Pierce
Address: 250 MLK Jr. Blvd, Coatesville PA 19320
Executive Director/CEO E-mail: bill.pierce@coatesvilleseniorcenter.org
Phone: 610-383-6900
Website: www.coatesvilleseniorcenter.org
Year Incorporated: 1977
Primary Contact Name: Bill Pierce
FEIN: 23-2040210
Primary Contact E-mail: Same

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): Chester County; however, largely the City of Coatesville and the communities of the Coatesville Area School District.
Describe Population Served and Annual Number of People Served: More than 1,000 adults age 50 and older; generally, those most vulnerable due to income, health, and other socio-economic issues.

Mission: To provide a welcoming place where people 50 and better can socialize and enhance their ability to live fulfilling and healthy lives.

Proposal Summary: To secure funds for Phase I of strategic planning; Appreciative Inquiry guided board and staff retreat. Phase I to be facilitated by Angela Greenwald, Ph.D.

If Capacity Building Proposal, the focus is:
X Mission, Vision & Strategy ___Governance & Leadership ___Strategic Relationships
___Fundraising & Development ___ Technology Other: ______________________________

Annual Budget $423,000 4.75 % of Full-Time Equivalent Paid Staff
81% of budget for program expenses 16 # of Board Volunteers
6% of budget for administrative expenses 89 # of Active Non-Board Volunteers
13 % of budget for fundraising expenses 7,698 # of Volunteer Hours

Top 3-5 funding sources:
Chester County Dept. of Aging $124,614; W.W. Smith Charitable Trust $19,808; CCCF (Whitford) $12,500

Grant Amount Requested from the Community Foundation: $4,500.00
II. CHESTER COUNTY COMMUNITY FOUNDATION
GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

Nonprofit’s history, goals, key achievements and distinctiveness
To provide a welcoming place where people 50 and better can socialize and enhance their ability to live healthy and fulfilling lives.

Founded in 1977 as a Meals Together program, CASC spent much of its organizational life providing services to the City of Coatesville and 14 surrounding municipalities from the walls of a two-story converted house on 5th Avenue. In May 2016, CASC accepted the keys to a new one-story, state-of-the-art facility just blocks away from their former location. Situated near Ash Park and the Luken’s Historic District and neighbors to City Hall, the new CASC offers a safe and welcoming place for older adults to gather.

In addition to a new home, CASC recently underwent significant staff transition. Now under the leadership of Bill Pierce, an experienced executive director with extensive knowledge of nonprofit and aging issues, Bill and his team have spent the past 30-months changing the image of CASC in the community. With dedicated and experienced professionals filling out the team, CASC has quickly become the ‘hot spot’ for older adults in Chester County (see demonstrated growth below; statistics provided are July 1 through June 30 respectively).

<table>
<thead>
<tr>
<th>Service Tracked</th>
<th>FYE19</th>
<th>FYE18</th>
<th>FYE17</th>
<th>FYE16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average Daily Attendance</td>
<td>70</td>
<td>42</td>
<td>33</td>
<td>33</td>
</tr>
<tr>
<td>New Consumers</td>
<td>688</td>
<td>292</td>
<td>205</td>
<td>279</td>
</tr>
<tr>
<td>Unduplicated Consumers</td>
<td>1,226</td>
<td>683</td>
<td>579</td>
<td>643</td>
</tr>
<tr>
<td>Lunches Served</td>
<td>11,503</td>
<td>7,191</td>
<td>5,634</td>
<td>4,717</td>
</tr>
<tr>
<td>Unduplicated Lunches Served</td>
<td>612</td>
<td>339</td>
<td>189</td>
<td>134</td>
</tr>
<tr>
<td>Average Daily Lunch Attendance</td>
<td>49</td>
<td>31</td>
<td>23</td>
<td>21</td>
</tr>
<tr>
<td>Breakfasts Served</td>
<td>3,333</td>
<td>2,880</td>
<td>1,909</td>
<td>1,871</td>
</tr>
<tr>
<td>Unduplicated Breakfasts Served</td>
<td>200</td>
<td>115</td>
<td>79</td>
<td>80</td>
</tr>
<tr>
<td>Average Daily Breakfasts Served</td>
<td>14</td>
<td>12</td>
<td>12</td>
<td>12</td>
</tr>
</tbody>
</table>

*For the period July 1, 2019 through August 31, 2019, average daily attendance is 90 and average daily lunch attendance is 58.

CASC is way more than BINGO (though we do BINGO well)! Explosive growth over the past 24-months has prompted CASC to open dialogue about the organization’s future. The new state-of-the-art facility is quickly becoming too small for the current use and is decidedly inadequate to accommodate future growth. In the coming months, the board of directors will focus their attention to planning giving particular consideration to increasing the size of the physical facility (whether that means expanding the current facility or acquiring new space), board development (including leadership rotation and concentrated recruitment efforts), and expanding staff resources (ensuring continued training and development of current staff and the recruitment of additional staff).

Organizational goals for the current fiscal year include (a) engagement of strategic planning counsel; (b) collaborative committee work (finance and fund development) to strengthen operating budget and overall fiscal health; (c) continued improvement on service statistics.
Funding request

*How will this capacity building initiative impact your nonprofit?*

As demonstrated in the previous section, CASC is experiencing unprecedented growth. While the organization’s board and staff continue to set (and achieve) short-term, annual goals, the current growth has heightened the urgency for the organization to set a long-term plan with a clearly defined vision.

Additionally, the organization has experienced a positive transition in the professional skill of the paid staff. Current staff have expressed interest in determining CASCs place in expanding beyond the role of ‘activity center’ to determine what, if any, role CASC should play in addressing community-level problems such as the opioid crisis and its impact on older adults, and/or expanding knowledge and capacity to serve the LGBTQ+ aging population.

A strategic plan will allow CASC to have the greatest possible impact on the people and the communities served, maximize fundraising dollars, and ensure that organizational priorities, projects and work remain mission aligned.

*How will this impact be measured?*

Small capacity building grants have considerable value when leveraged appropriately to attract additional funders to important projects. Furthermore, small capacity grants allow the Grantmaker an opportunity to become more intimate with their funded partners, potentially opening additional opportunities for organizational growth.

Short-term impact is easily measured in the successful completion of Phase I of the identified strategic planning process. Phase I will be guided by Appreciative Inquiry, a strength-based approach to evaluation and planning.

Long-term impact is measured by the completion of the strategic plan, and analyzing the organizational achievements compared to the planned results.

At the core, CASC hopes that strategic planning will allow the organization to embrace a culture of change, encourage board evolution (including recruitment, retention and rotation), give a new respect to the development and retention of professional staff, and strengthen awareness and support from the community.

*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. Include external consultant proposals if applicable.*

Phase I of the strategic planning process encompasses a period of 3-days and is currently scheduled for January 2020. The three-day process will include interviews with the executive director and staff and a full-day retreat with board and staff that will focus on:

- Overview of Appreciative Inquiry
- Clarification of difference between traditional planning and strength-based planning
- Allow the board the opportunity to appreciate one another and translate that learning to enhanced stakeholder engagement
- Discuss opportunities for stakeholder engagement
- Prepare a plan to build excitement for the final strategic planning process.
Additional work includes material design, data collection, and data synthesis.

The board has engaged Angela Greenwald, Ph.D. Ms. Greenwald earned a doctorate in Organizational Development, a Master’s in counseling, and a Bachelor’s in Psychology. She is a licensed Professional Counselor, a certified Appreciative Inquiry Trainer, Coach and Facilitator among other professional certifications (professional resume and full description of services is enclosed).

**Anticipated Costs**

<table>
<thead>
<tr>
<th>Item</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Costs (Breakfast &amp; Lunch)</td>
<td>$370</td>
</tr>
<tr>
<td>Facility Rental</td>
<td>$1,000</td>
</tr>
<tr>
<td>Professional Facilitation</td>
<td>$3,130</td>
</tr>
<tr>
<td><strong>Total Cost</strong></td>
<td><strong>$4,500</strong></td>
</tr>
</tbody>
</table>

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**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 proposals to [grants@chescocf.org](mailto:grants@chescocf.org). Receipt will be confirmed by e-mail.
- Please contact Grants Administrator Kevin Baffa at (610) 696-8211 [grants@chescocf.org](mailto:grants@chescocf.org) with questions.