**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.
- 99% of the grants issued by the Community Foundation are made possible through the generosity of the Fund Advisors who grant through their Donor Advised Funds.
- $2.5+ million is granted annually to nonprofits in Chester County and beyond.
- All Community Foundation Funds accept this grant application form.

**Proposals submitted by nonprofits are considered for 2 types of grants:**

### FIELD OF INTEREST & DONOR ADVISED FUNDS (No Deadline)

- 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.

### FUND FOR CHESTER COUNTY CAPACITY BUILDING GRANTS (Due 9/15)

- 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 annually by **September 15** are eligible for this grant program.
- Capacity building projects should strengthen a nonprofit, in areas including:
  - Mission, Vision & Strategy
  - Governance & Leadership
  - Strategic Relationships
  - Operations and Technology
  - Fundraising & Development
- Grant **awards** typically 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 grant program.

- 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, Donors, and the Grants Committee.
- The electronic form is available at [www.chescocf.org](http://www.chescocf.org).
- Per IRS regulations, applicants must be charitable, tax exempt organizations with 501(c)(3) certification and cannot be individuals
- **E-mail proposals to grants@chescocf.org.** Receipt will be confirmed by e-mail.
- Please contact Grants Administrator Kevin Baffa at (610) 696-8211 grants@chescocf.org with questions.
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 08/23/19–received 9/16

Contact Information
Organization Name: Kennett Area Senior Center
Exec. Director/CEO Name: Anita M. O’Connor
Address: 427 S. Walnut St., Kennett Square, PA 19348
Exec. Director/CEO E-mail: aconnor@kennettseniorcenter.org
Phone: 610-444-4819
Board of Directors Chair Name: Robert Listerman
Website: www.kennettseniorcenter.org
Primary Contact Name: Anita M. O’Connor
Year Incorporated: 1972
Primary Contact E-mail: aconnor@kennettseniorcenter.org
FEIN: 23-1943595

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 _Y_ No ___ Not Sure ___
____X_ 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 ___ Human Services ___ Religion

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

Describe Population Served and Annual Number of People Served:
The Kennett Area Senior Center (KASC) served more than 1,877 unduplicated senior citizens visiting over 18,542 times during the 18-19 fiscal year. More than 50% of the seniors who use the Senior Center have a low-to-moderate income, live alone, and are at-risk for one or more chronic diseases, including mental illness and poor nutrition.

Mission:
Kennett Area Senior Center helps adults 50 and better live healthy, active and independent lifestyles.

Proposal Summary:
The Board of Directors is currently working on a Strategic Plan with the help of a CCCF grant and Ms. Connie Carter. KASC needs to review and evaluate our bookkeeping/accounting practices, policies and procedures with a CCCF grant.

If Capacity Building Proposal, the focus is:
___ Mission, Vision & Strategy ___ Governance & Leadership ___ Strategic Relationships
___ Fundraising & Development ___ Technology Other: Operational Efficiency and Improvement: –

Bookkeeping and Accounting Practices
Annual Budget $ 509,055 6 # of Full-Time Equivalent Paid Staff
__75__ % of budget for program expenses 12 # of Board Volunteers
__15__ % of budget for administrative expenses 442 # of Active Non-Board Volunteers
__10__ % of budget for fundraising expenses 21,053 # of Volunteer Hours

Top 3-5 funding sources: Chester County Dept. of Aging Services: $130,033; United Way of Southern Chester County: $29,600; Book Shoppe & 2nd Floor apartment: $65,250 (net); Annual Giving: $74,753; Fundraising Dinner: $47,253 (net)

Grant Amount Requested from the Community Foundation: $ 3,000

2-2019
Mission: Kennett Area Senior Center helps adults 50 and better live healthy, active and independent lifestyles.

History: Founded in 1972, the Kennett Area Senior Center is a private community-based, not-for-profit organization that serves adults over 50 who live in more than 16 municipalities in southern Chester County, and beyond. Dr. Leonard Kanofsky and members of the Rotary Club of Kennett Square created the senior center out of concern for older local residents.

Target population: Economically Challenged, Infirm, Physically Challenged, Adults, Elderly

Distinctiveness: The Kennett Area Senior Center is the only full-service organization providing a myriad of services to low income older adults, including:

* Nutrition programs* including hot congregate meals each weekday at lunch, supplemental nutrition information and food in collaboration with the Chester County Food Bank including food boxes for home-bound older adults, special meal-focused events around Sunday dinners, birthdays, and special occasion lunches and dinners, and nutrition information taught by licensed nutritionists through workshops on such topics as diabetes and heart diets, medication and weight management.

* Wellness programs* include programs for physical health via expert-led classes, volunteer-driven activities, and collaborations with the YMCA for exercise and a retirement community for aquatic exercise with a physical therapist. Mental health programs offered address loss of memory, concentration, depression, anxiety and anger. These programs include professionally-led workshops on mindfulness and mental health issues, support groups on the topics of bereavement, grief and Alzheimer’s, and memory-stimulating and resiliency programs. Services include one-to-one consultation by trained staff for information and assistance, expert help to improve financial stability including AARP tax preparation and Medicare, prescription drug and supplemental insurance consultation.

*Lifelong Learning and Personal Empowerment* through weekly structured classes and groups based on the interests of members. Topics include digital photography, arts & crafts, sewing, needlework, a Living History Storytelling Program, technology assistance, book clubs, and AARP Safe Driver Course.

*Assisted Senior Program (ASP):* This program offers socialization and meaningful activity for individuals who are living with Alzheimer’s-type memory impairment and/or mild mobility impairment, as well as much needed respite for their caregivers and their families. The program is designed to be an affordable intermediary option prior to seniors requiring adult day care or an assisted living. Offered 5 days a week, up to 8 hours each day, the ASP program includes physical, mental and spiritual stimulation. Services are intended to spark life-extending, mind stimulating activity that can result in the maintenance of, or increased functionality. The program fulfills the guiding gerontological principle of having people in the least restrictive setting possible by providing the individual attention and programs for persons with memory and/or mobility impairment who should not be left home alone. This results in reducing the incidence of premature institutionalization, while enabling caregivers to continue working and prolonging their ability to keep their loved one at home.

Achievements:
Worked cooperatively with the PA Dept. of Aging to prevent legislation that would have effectively (though not by intent) prevented Pennsylvania senior centers from operating respite programs (programs designed specifically for caregivers and their seniors such as our Assisted Senior Program.
Provided a record number of educational and informational presentations. Topics were presented by qualified proctors including local university professors and licensed presenters, e.g., registered dietician.

**Service Statistics:** 1,877 unduplicated individuals are served in all programming with over 18,542 visits.

**Staffing:** KASC is staffed by 6 full time and 6 part-time staff plus 442 active volunteers. Stephanie D'Amico, Executive Director, has over 25 years related experience in non-profits. Anita O’Connor, Director of Philanthropy, has over twenty-five years of experience in management, fundraising and related functions. Andrea Durynski is Program Coordinator, Kelly Regester is Kitchen Supervisor and Lizabeth Conners is Information & Assistance plus Assisted Senior Program Coordinator and Bert Lutz is Office Manager and Bookkeeper.

**Board:** 12 board members meet 10 to 11 times/year. The Board meets every other month for a full, “regular” board meeting to discuss finances, current activities and progress. The other months, with the exception of December, when no board meeting is scheduled, are “working” meetings, scheduled for a single matter of importance requiring the full scheduled time to address or resolve the matter.

**Funding request:**

The purpose of our request for $3,000 in capacity building support funding is to engage a financial consulting firm to review our financial accounting practices and internal controls; evaluate our data entry and recording procedures (associated with QuickBooks); advise on our internal financial reporting to our Treasurer, Finance Committee and Board of Directors; and to provide recommendations for improving each of the above activities as appropriate.

Currently, we have a bookkeeper who handles:

1. Making journal entries for all receipts, payments, and other financial transactions;
2. Filing source documents for all journal entries recorded;
3. Posting journal entries to ledger accounts;
4. Performing bank reconciliations;
5. Preparing payroll;
6. Preparing cash flow statements;
7. Preparing financial reports; Participating in monthly internal audits by the Board Treasurer and a second Board Member.

**Our Executive Director:**

1. Reviews monthly journal entries
2. Monthly reports for presentation to the finance committee
3. Leads the budget process
4. Monitors the financial goals of the organization
5. Reviews invoices and approves and signs checks
6. Reviews payroll and bank reconciliation records
7. Reviews investment statements
8. Ensures compliance with internal control policies & procedures.
9. Works with the Bookkeeper to produce all documentation needed for the annual outside audit.

**Our Treasurer:**

1. Reviews monthly balance sheets, income statements, and cash flow reports prepared by the Bookkeeper
2. Prepares the agenda and presents reports to the finance committee review and approval
3. Works with the Executive Director and other staff and Board Members to create the budget.
4. Monitors and coordinates the updating of internal control policies as needed.
5. Monitors investment activity as needed.
6. Reviews the annual audit

Our Finance Committee:
2. Makes finance policy change recommendations to the Board of Directors as needed.
3. Periodically reviews internal control policy and procedure documents.
4. Reviews and approves the annual audit, and recommends the audit for Board approval.
5. Monitors the status of the organization’s investments

Our Board of Directors:
1. Reviews and approves monthly financial reports and the annual budget
2. Reviews and approves the annual audit before it is finalized.
3. Reviews financial control policies and procedures
4. Monitors fiscal sustainability

The organization’s management, advisors, and Board of Directors have made suggestions, changes and improvements in our financial procedures as well as accounting and reporting processes from time to time. However, we have never had a comprehensive review of these activities by an outside organization as a whole. We need to ensure that we have logical, consistent, thorough and appropriate processes in place to ensure accuracy of data and reports, adequacy in reporting, and appropriate internal control. A global review of these activities by an independent organization will ensure optimal fiscal management going forward.

How Impact and Results will be demonstrated
We will be successful in carrying out the intent of our grant request when we:
1. Engage the consulting firm for this project
2. Establish a project timeline with the assistance of the consultant, which includes:
   a. Setting the goal of completing the project within 3 to 4 months;
   b. Convening a 1 hour meeting of the Board Treasurer, bookkeeper and Executive Director to establish the parameters of the work to be done;
   c. Providing the consultant access to our bookkeeping department, QuickBooks, financial records and files
   d. Receiving a written analysis of the financial policies, procedures, and methodology of our bookkeeping activities;
   e. Implementing the recommendations of the plan

After the plan is implemented, success will look like:
1. An assurance that data, including receipts, expenses, and accounting entries is accurate and appropriately entered;
2. An assurance that internal financial controls are appropriate to protect the organization
3. Appropriate procedures that optimize bookkeeping and accounting efficiency and accuracy; and
4. The Board of Directors has sufficient financial information to advise and steward the organization appropriately

KASC recognizes the expertise available through Chester County Community Foundation’s partnership with the C4 Collaborative and identifies opportunities with several of the consultants, for example, Countryside Consulting, or Your Nonprofit Controller. A specific consultant for this project has not been selected, but, if KASC is awarded a capacity building grant, the process to select one could include guidance from Foundation staff on which consulting groups might best address the issues presented in this proposal.