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 9/9/2019

Contact Information
Organization Name: Orion Communities (Orion)  Executive Director/CEO Name: Kris Keller
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Phone: 610.415.114  Board of Directors Chair Name: Keith Burress
Website: OrionCommunities.org  Primary Contact Name: Kris Keller
Year Incorporated: 1977  Primary Contact E-mail: Same as above
FEIN: 24-2074061

Organization Information:
Field/s of Interest:
___ Arts, Culture & Humanities  ___ Environment/Animal Welfare ___ X Education
___ Health  ___ X Human Services  ___ Religion

Mission: Orion offers hope for individuals and families experiencing hardship due to poverty, disability, or illness by building bridges that lead to self-reliance.

Geographic Area Served (If not all of Chester County, specify primary Chester County regions served): Primarily Chester County but clients also come from other areas of Southeastern PA

Describe Population Served and Annual Number of People Served: Individuals living with poverty, illness or disability

Annual Budget $748,000 _____________________ 7.2 ___ # of Full-Time Equivalent Paid Staff
___84___ % of budget for program expenses  ___12___ # of Board Volunteers
___9___ % of budget for administrative expenses ___75___ # of Active Non-Board Volunteers
___7___ % of budget for fundraising expenses ___6000+___ # of Volunteer Hours

Top 3-5 funding sources:
Community Coalition - $85,000, Community Clothes Charity - $30,000, The Philadelphia Foundation (Milton Applebaum) - $20,000. 2 private donors – anonymous between $43, 270 and $45,000.

Is this grant proposal for: Capacity Building ___X_ or General Operating ____?

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

Grant Amount Requested from the Community Foundation: $5000________________

2-2019
**Proposal Summary:**
Orion Communities has grown from a budget in 2015 or $85,000 to $598,000 in 2019 that was reforecast this summer to $748,000. The reforecasting was required for two reasons: 1) the restructuring of a partner organization that now refers case management and direct aid clients they previously supported to Orion and 2) a foundation requesting Orion to manage a program helping those who are experiencing homelessness to move towards permanent housing, this came fully funded and valued up to $175,000/year.

Orion’s case management database is stretched to handle this new work plus the recent growth of in-house programming. Fortunately, we have identified a data base system that eliminates redundant entry, increases system efficiency and can be expanded to be used as a community information system with partner organizations that meet HIPPA guidelines. Increased efficiency, improved management and metric reporting, plus the opportunity to increase community collaboration has initiated this capacity building grant.
Nonprofit’s history, goals, key achievements and distinctiveness
Orion Communities was founded 42 years ago to address gaps in social services for people living with poverty and disabilities. Orion has never received government funding and the focus continues to be serving the ‘poorest of the poor’ and people who fall through the cracks of the social service safety net without receipt of government funding.

In 2014/2015, the Board of Directors restructured Orion to be more effective and efficient in addressing unmet needs for our most vulnerable neighbors. The response has been positive. In December 2014, Orion averaged 15 clients per month and now averages well over 200 clients each month. Funding and volunteers have also increased and diversified allowing Orion to balance support of our neighbors in need with sustainable organizational growth. In 2016, Orion moved to a larger office and in the winter of 2019 expanded again to better meet the needs of the growing family centered program offerings.

Mission implementation and programming begin with Bridge Case Management that provides short-term case management to assist in a period of transition, crisis or change. Due to foundation and community support, Orion is able to gift $6000-10,000 each month to help families avoid eviction, get to work and appointments, keep food on their table, and more. In 2018, 1190 households were assisted and financial assistance from Orion averaging just $70/household.

Orion has received new funding this year to provide innovative tools to assist the case managers in stabilizing our families such as PLAN for transitioning from homelessness to permanent housing (which is fully-funded and valued up to $175,000 per year), one-on-one budget coaching and more. Orion has been presented with matching gift challenges of $40,000–60,000 each of the past 5 years.

Orion takes a micro/macro approach to problem solving for our under resourced neighbors. For the individual or family who comes to the door, Orion helps secure life’s basic essentials and work with our clients to develop plans to move towards a more sustainable future. For the larger community engagement, Orion strives to build partnerships and engage community leaders to help address systemic challenges.

Orion has been the catalyst for a local winter night shelter for the homeless, creation of a Borough council-led task force to generate solutions for affordable housing challenges and bringing the national model Bridges Out of Poverty to our community.

Orion is committed to address gaps for our under resourced families. STARS (Sharing Technology Advances Reading Skills) is a reading, digital literacy and computer/book giveaway program that engages both children and parents to improve academic performance plus enhance communication with the children’s school and teachers. To
date, STARS has worked with over 150 children, 20 parents and gifted over 70 computers and 6000 children’s books with the goal to help close the academic gap for students from low income households. GLAD (Gutsy Ladies Achieving their Destiny) is another Orion program that is trauma-informed and supports single mothers by helping participants expand their parenting and life skills.

Last year, Orion Communities was selected by the United Way of Chester County and Federal Reserve Board as one of 8 non-profits to present programming needs to 9 banks – as a result of this 'speed dating with bankers' Orion received 34 feet of custom made bookshelves for STARS and several new banking partners. This spring Orion was approved for Pennsylvania Educational Improvement Tax Credit (EITC) for our STARS program.

Two articles published in the past year highlight Orion’s work …
https://www.phoenixvillenews.com/orion-communities-provides-haven-of-opportunities/article_e3ce1b93-8edf-5f26-aa4e-e3c146ccefef.html


This video explains how Phoenixville came to work together to address the need for more affordable housing… https://youtu.be/Q4iNuBMPxxc

Capacity Building

In the past 5 years, Orion has grown in total clients and programs but also has been able to distribute a marked increase in funds to help stabilize our neighbors in need – growing from zero in 2014 to close to $20,000 per month. More recently, this summer Orion experienced a 30% increase in the number of clients contacting our staff and volunteers. This is partly due to the restructuring of a partner organization that now refers clients to Orion for case management and emergency funds.

Orion’s need to manage program data has grown dramatically. The challenges of the current data management system include:
- Redundant and inefficient data entry
- Limits on scalability to accommodate Orion’s increase in clients and programs
- Slow speed of processing and reporting data
- Cumbersome manipulations to capture metrics
- Lack of scheduling tool

New non-profit management data systems have become available that are more sophisticated. Technology enhancements improve internal controls by providing the latest in efficient, reliable, and secure data management for mission-critical and on-line transactions. New systems can cost-effectively handle the volume of data but also are responsive to the current needs for management tools and tracking program metrics. The goals are to upgrade our data management system to better meet Orion’s mission and to improve efficiency in serving clients and capturing measurable impact.
In researching potential new data management systems, CaseWorthy has come to the forefront. It is currently used by 50+ partner organizations in Lancaster and is well received. Not only does it address Orion’s growing needs for managing our records and tracking outcomes but it is also designed so that it can be used by multiple organizations within a community so that specific data can be shared between agencies and still be in compliance with HIPPA laws.

The immediate objectives are to make better use of staff time by reducing redundancy, improve management reporting on use of resources and trends, increase positive impact on our client’s lives and readily capture trends.

Implementation Plan
- Work flow analysis
- System configuration
- Development of management reports
- Test
- Training
- Upload current records and go live

Implementation will take 3-5 months depending on the length of time needed for work flow evaluation and the extent of configuration. In preparation to implement a new data management system, Orion management is receiving guidance from Orion’s technology & systems volunteers and is visiting current end-users. This expertise will support design and implementation of our new data system with key features that include ease of use, ability to expand, built in metrics, and potential to collaborate directly with partners.

The cost to implement CaseWorthy is estimated at $6000 for initial set up and $3000 to configure to Orion’s requirements plus staff time for work flow analysis and training.

Expected outcomes include improved organizational effectiveness and efficiency. An enhanced data management system will improve staff efficiency, reduce client time in receiving services, efficiently track outcomes and impact as well as help to identify trends, and increase collaboration and efficiency with partner organizations as other’s implement the system.

Orion will monitor CaseWorthy’s effectiveness by tracking the number of clients seen, the quality of reporting, the ability to replace anecdotal stories with real time data and examining its ability to track trends and report measurable impact. Implementing CaseWorthy will ensure more resources go directly to serving those in need.

Many thanks to Chester County Community Foundation for past Capacity Building support during our restructuring to stabilize program and funding. At this time, Orion is requesting $5000 to implement a new and efficient data management system to support growth and effectively manage programming that serve the most vulnerable in our community. Thank you.