

The Chester County Nonprofit Innovation & Resiliency Fund

Administered by the Chester County Community Foundation

In cooperation with regional funders, donors, united funds and County government departments

Recognizing the importance of the nonprofit sector to the high quality of life throughout Chester County, the Chester County Commissioners have allocated \$3.5M to help nonprofits recover with innovation and resiliency. This funding is from the federal Coronavirus Aid, Relief, and Economic Security (CARES) Act.

Per the CARES Act, grants must cover unforeseen financial needs and risks created by the COVID-19 public health emergency. **This includes grants to implement and publicize the safe resumption of programs and services.** The Community Foundation seeks proposals to support innovative, resilient COVID recovery needs, such as:

- Program and service redesign, in light of social distancing and public safety requirements
- Innovative technology to support virtual, mobile and/or pop-up programs and services
- Redesigned and reconceived marketing, fundraising and special events
- Strategic planning pivoting, refinement and revisions in light of COVID-19
- Partnership, merger, consolidation and/or acquisition activities due to COVID-19 impacts
- Infrastructure improvements due to COVID, including plexiglass dividers, technology upgrades, etc.
- Higher operating costs related to cleaning and social distancing requirements
- Other one-time or increased expenses incurred related to COVID-19.

This is a competitive, time-sensitive grants process. Grant decisions will be made weekly, on an ongoing basis. Electronic grant applications are only accepted by e-mail. No paper applications are accepted.

Eligibility

- Nonprofit 501 (c) (3) organization formed and active in 2017 or earlier
- Nonprofit must be headquartered and providing services in Chester County, as evidenced by legal address in Box C of IRS 990

Priority Preference for Grant Funding

- Nonprofits that provide clear evidence of how they aim to/are reshaping their programs, services, administration, marketing and fundraising, to safely provide services and thrive in light of COVID impacts
- Nonprofits with substantial costs to comply with COVID public health requirements
- Nonprofits that serve a diverse constituency, and are governed and managed by diverse leadership

Ineligible Entities

- Nonprofits NOT headquartered in Chester County, PA, as evidenced by the legal address in Box C of the IRS 990
- Nonprofits NOT delivering services in Chester County
- Nonprofits that did NOT experience revenue loss due to the coronavirus pandemic and/or nonprofits that have no additional costs associated with the coronavirus pandemic
- Nonprofits that were NOT operational as of December 30, 2017
- Government or government-owned or controlled entities
- Churches or religious organizations with respect to their primarily religious activities and/or their activities which limit participation to members of the church or religious organization
- For-profit businesses
- Private clubs/organizations that limit membership for reasons other than capacity
- Nonprofits primarily engaged in lobbying or political activities
- Nonprofits NOT compliant with all federal, state, & local laws, including taxation
- Nonprofits NOT compliant with current public health guidelines, including coronavirus pandemic phased reopening restrictions ###





Contact Information

Nonprofit Org Name: Historic Sugartown, Inc.	ED/CEO Name: Heather P. Reiffer
Address: P.O. Box 1423, 690 Sugartown Road	ED/CEO E-mail: hpreiffer@historicsugartown.org
City, State Zip: Malvern, PA 19355	Board Chair Name: John C. Nagy, Jr.
Phone: 610-640-2667	Grant Proposal Contact Name: Heather Reiffer
Website: HistoricSugartown.org	Grant Proposal Contact E-mail: hpreiffer@historicsugartown.org
EIN: 23-2215382	Grant \$ Amount Requested: \$11,500
Year Founded: 1982	

In filing this application, the nonprofit certifies that it complies with all federal, state & local laws, including taxation; complies with current public health guidelines; and complies with coronavirus pandemic phased reopening restrictions.

Agreed by: Heather P. Reiffer Date: 10/26/2020

Nonprofit Field/s of Interest

<input checked="" type="checkbox"/> Arts, Culture & Historic Preservation	<input type="checkbox"/> Education	<input type="checkbox"/> Health
<input type="checkbox"/> Community Development	<input type="checkbox"/> Environment & Animal Welfare	<input type="checkbox"/> Human Services

Figures	Current	PRE-COVID (as of 1/1/20)
Annual Operating Budget	\$316,650	\$341,000
Full-Time Equivalent Paid Staff	3.5	3.5
# Board Volunteers	15	15
# Committee Volunteers	5	5
# Active Direct Service Volunteers	35	40
Annual Volunteer Hours	75	500

Funding: Please indicate if your nonprofit has received funding from any of these regional sources over the past few years. We will invite them to review this funding request.

<input type="checkbox"/> ChesCo Comm Fdn	<input type="checkbox"/> Brandywine Health Fdtn	<input type="checkbox"/> United Way ChesCo	<input type="checkbox"/> ChesCo Dept Comm Devel
<input type="checkbox"/> ChesCo Fund/W&Girls	<input type="checkbox"/> Phoenixville Comm Health Fdtn	<input type="checkbox"/> United Way S ChesCo	<input type="checkbox"/> ChesCo Dept Health
<input checked="" type="checkbox"/> Other significant funders: PA Historical & Museum Commission			<input type="checkbox"/> ChesCo Dept Human Svcs

Narrative: In a few concise paragraphs, please explain:

- Mission**
- What geographic area is served?** (If not all of Chester County, specify primary Chester County regions served)
- What population is served? How have your service numbers been impacted by COVID?**
- What has been the impact of COVID-19, and how has your nonprofit responded?**
- What would this funding be used for? How does this demonstrate innovation and resiliency in dealing with COVID impacts? What would be the community impact of this anticipated funding? Why is it important to fund this now?**
- How much funding is sought? How does this compare to your annual operating budget and this years' projected deficit? What is the expected timeframe for use of funds?**

Historic Sugartown, Inc.

Narrative

1. Mission: The mission of Historic Sugartown, Inc. (HSI) is to inspire the community to engage with the past through authentic 19th-century experiences, participate in the village's present life and protect it for the future. HSI was founded in 1982 to preserve the 19th-century village of Sugartown, located within the Sugartown National Historic District in Malvern, Pennsylvania. HSI stewards 11 structures and 9.2 acres including 4.2 acres protected by a conservation easement with Willistown Conservation Trust. Historic buildings include the c. 1805 William Garrett House, the c. 1835 Hannah Cheever House and Barn, the c. 1860 Sharpless Worrall House and the c. 1880 General Store. HSI's collections include domestic, industrial and agricultural artifacts as well as decorative arts pieces. HSI also stewards collections owned by the Chester County History Center (CCHC/CCHS) that support HSI's interpretive programs and exhibits. These collections interpret 19th-century rural village community life in Pennsylvania and early American craftsmanship. HSI's Carriage Museum, which interprets early transportation history between c. 1790 – c. 1910, exhibits CCHC's collection of early American transportation vehicles in their original condition. HSI's Book Bindery stewards the Fred and Elke Shihadeh Collection of over 2,500 American and European-crafted embossing tools and bookbinding equipment dating from c. 1780 – 1850. It is thought to be the largest such collection in the United States. Since 2014, Historic Sugartown has focused on actively increasing its visibility and relevance in its community by creating engaging seasonal programs and events that are meaningful today. Prior to COVID, HSI's programming included nearly 30 Bindery workshops, guided tours and six signature programs, including its Cabin Fever Family Fun day, a Mid-Winter Tea, a series of summer Biergartens, Shugart's Sunday - BBQ & Blues, Lantern Tours and A Sugartown Christmas.

2. Geographic Area Served: Historic Sugartown is located on the outskirts of Malvern in Willistown Township. The historical attraction attracts visitors from throughout Chester County and the greater Philadelphia region. Workshops in HSI's Book Bindery have drawn an increasingly national audience, even before the organization started holding virtual workshops in response to the pandemic.

3. What population is served? How have your service numbers been impacted by COVID?

Historic Sugartown largely attracts audiences from the local communities of Malvern and West Chester, and visitors from the greater Philadelphia area, particularly families and seniors, through its seasonal programs and events. HSI's Book Bindery serves a specific audience of students, scholars, conservators, and book arts enthusiasts interested in the traditional crafts of hand bookbinding, paper marbling and book restoration. School and group tours make up a smaller, but growing audience for the organization. HSI also actively collaborates with local special needs organizations to provide opportunities for career assessments and mutually beneficial community service projects.

In its 2015-2017 Strategic Plan, HSI identified the need to grow the organization's visibility in the community through programs and events, and measured success in this endeavor through increased site attendance. Annual attendance doubled since 2015, with over 4,050 visitors in 2019. Attendance in January and February 2020 tracked higher than last year during the same months, and the upward trend was expected to continue as spring workshops and programs were sold out. As of October 2020, HSI's annual attendance is 72% lower than this time last year, mostly because of the loss of the larger seasonal programs and community events. This trend will continue through the end of the year as HSI's annual Lantern Tours and Sugartown Christmas events have been cancelled. HSI is also concerned that it will need to rebuild relationships with the businesses and organizations that provided volunteers who supported these programs because most were forced to suspend these activities. It's uncertain when and if they will be able to return.

4. What has been the impact of COVID-19, and how has your nonprofit responded?

COVID-19 forced Historic Sugartown to shut down on March 13, 2020. Because historic sites are classified by the State as "Leisure and Hospitality," HSI was not allowed to reopen until the Green Phase in late June. This meant the cancellation of HSI's sold-out March Tea, two Summer Biergarten dates, seven workshops in the Book Bindery, scheduled group tours, and guided tours. HSI was committed to retaining its three full-time staff members, and secured a PPP Loan to offset the projected loss on program and event revenue, as well as the potential loss of HSI's real estate rentals. (Fortunately, the latter remained stable, and has remained critical in providing HSI with dependable income this year).

With the shutdown, HSI's Executive Director and Director of Programs shifted to 100% remote work, while the organization's Facilities Manager combined remote work with daily site visits to check on the buildings and perform routine maintenance. HSI experienced the unique circumstance where three of its commercial office tenants were designated essential businesses that could continue to work through the shutdown. This made it vital to have an on-site presence to perform daily cleaning and disinfecting. The Facilities Manager also took on the required role of Pandemic Safety Officer, working with the Executive Director to identify needs in all the buildings related to COVID safety, and implementing safety measures.

With programs cancelled, HSI made the decision to shift some of the Director of Programs (DOP)'s responsibilities to evaluating and improving HSI's online capacity to improve HSI's long-term infrastructure. The DOP, who has a background in web design, redesigned Historic Sugartown's website to make it more user-friendly. She improved its program calendar and registration capabilities, integrated it with HSI's social media, and created the foundation that will support future online exhibits. The new website now features an interactive "Share Your Story" page for residents to share their memories of Sugartown – both new and old - to capture local oral histories. The DOP also identified a new cloud-based software for collections stewardship that will enhance how HSI documents its artifacts and that will integrate with the organization's website. This will support a project to make some of HSI's collections available online in 2021. The DOP was also tasked with developing technical support strategies for new virtual workshops and programs.

Reopening: As Pennsylvania slowly reopened, HSI staff assessed the status of workshops, programs and scheduled tours on a monthly basis, and offered refunds when cancellations were announced. Initially, HSI's March Tea was postponed to September. In July, the decision was made to adapt the Tea's program to a virtual format, with the speaker offering her talk via Zoom, and the partnering Tea House provided tea packages for participants to pick up at Sugartown to enjoy at home. HSI offered an option for registrants to view the talk, donate their admission, or request a refund. Approximately 50% of the 48 attendees either viewed the talk or donated their admission. HSI opened the program to the general public for a small admission fee, expanding its reach. HSI also participated in the Chester County Planning Commission's virtual Town Tours in July, reaching 200+ participants.

Guided Tours resumed in July. Initially HSI established one tour time to test the waters to see if there was an interest before committing hours and funds to staffing guided tours. Tours were limited to five people for social distancing and were by advance registration only. The advance registration provision was significant as historic sites traditionally rely heavily on walk-in visitation. After a slow start, increased interest during October has prompted the discussion of adding more tour times. Because of indoor and outdoor capacity restrictions, larger programs and events remain suspended at Historic Sugartown through the end of the year. This includes HSI's annual Lantern Tours and its "A Sugartown Christmas" family event. HSI intends to keep plans for volunteers to decorate the village to offer community cheer through the holidays. HSI anticipates opportunities to adapt some of its larger events, such as the Summer Biergartens which attract 400+ people, to smaller formats in 2021.

New Opportunities: The shutdown brought Historic Sugartown new opportunities that will have a lasting impact. With the Book Bindery's workshops shut down, HSI's instructor, Ramon Townsend, decided to adapt his Book Restoration workshop to a virtual format. He worked with HSI's Director of Programs to develop workshop curriculum materials, and tested it out with a few of HSI's volunteers before advertising the 4-hour workshop. When the first workshop sold out its four spots immediately, five additional dates were added in the summer and fall. Materials are shipped to participants in advance of the workshop with detailed instructions on what to prepare in advance. With the new workshops, HSI discovered that the Book Bindery had a national audience that it could not reach before. Registrants from Louisiana, Tennessee and Rhode Island attended this summer's workshops, noting they could not find such offerings locally. Townsend is now testing out a virtual Book Sewing workshop and his Bookbinding I workshop to be offered starting in February. In-person workshops did resume in July, but the Bindery can only accommodate 4 participants and the instructor for social distancing purposes, compared to the 8 – 12 people who could register previously. It is anticipated that HSI will offer both in-person and virtual workshops in the long-term.

HSI identified another opportunity in September when a local Bible Study group approached the organization about renting the Carriage Museum to accommodate their meetings. The group had met outdoors all summer, and now needed a larger and warmer indoor space to allow the group to be socially distanced for their meetings. HSI developed a

new rental category for the Carriage Museum to allow small groups to use the large space for an affordable price while generating new income for the organization. The group has committed to a contract through the end of 2020, and HSI intends to promote the space's availability to others for this purpose.

Impact on Fundraising: Before the closures, HSI was preparing to announce a new fundraiser to take place in November, replacing its former autumn Shugart's Sunday – BBQ & Blues event. With the closure, HSI's Development Committee moved swiftly and made the decision to postpone the new event to the following November and refrain from any announcements. Instead, the Development Committee and Executive Director created a special Appeal to send to HSI's supporters, announcing that HSI would not hold an annual fundraising event in 2020 because of COVID, and urged them to contribute to help sustain the organization through the crisis. HSI raised \$25,000 through this effort, filling much of the gap left by the loss of the fundraising event. Though support from businesses was down, the majority of the individuals who previously supported Sugartown's events made contributions. HSI does not expect this special appeal to have a negative impact on its year-end fundraising.

5. What would this funding be used for? How does this demonstrate innovation and resiliency in dealing with COVID impacts? What would be the community impact of this anticipated funding? Why is it important to fund this now?

The funding will support the development of a Strategic Plan for Historic Sugartown that is informed by community input and an assessment of the organization's financial health, and that will incorporate board development and fund diversification strategies. The project demonstrates innovation and resiliency because it will strengthen HSI's internal capacity to reposition itself and respond to the new challenges presented by the COVID-19 pandemic, and will foster an organizational flexibility that will allow Historic Sugartown to continue to adjust and thrive as it emerges from the crisis and plan for the next three years. The Strategic Plan will be informed by a financial health and benchmark assessment, as well as a program cost-benefit analysis, to ensure that selected strategies and objectives are prudent and financially sustainable. In addition, the project will also evaluate current and potential funding sources to develop diversification strategies that align with the organization's mission and goals. The project will rely heavily on input from the community – Sugartown's donors, neighbors, local businesses, schools, other historical organizations and tourism partners – through online surveys, individual interviews and focus groups. The board development phase of the project will help to ensure that HSI has a robust, diverse board with the necessary skills to implement the new strategic plan and provide creative, strong leadership throughout these transitions.

Prior to the shutdown, HSI established a Leadership Team with plans to select a consultant and commence a strategic planning process in the Spring of 2020. HSI's previous Strategic Plan, while reviewed annually, had not been updated since 2017. The March 2020 shutdown and immediate uncertainty caused HSI's Board to place the new strategic planning effort on hold as the organization focused on developing reopening strategies. In September, HSI's Board determined that strategic planning must move forward now so that the organization can identify new strategies, particularly for its program delivery and fundraising, that will allow the organization to continue to weather the crisis and create a foundation for its long-term sustainability. HSI's Board also identified board development as critically important as 6 members of its Board will complete their final term (as allowed by HSI's by-laws) by 2023.

The anticipated funding will impact the community because the project will place Historic Sugartown on stronger footing to carry out its mission to protect Sugartown's richly authentic 19th-century village landscape and offer a deep sense of local identity within Chester County. Through the community engagement aspect of this project, HSI's programs will respond to changing community interests and needs, particularly in the light of the current crisis, and will ensure that Historic Sugartown continues to create meaningful experiences that are relevant to residents and visitors today.

It is important to fund this now because 2021 will be a critical year of recovery for Historic Sugartown, requiring additional organizational shifts to continue to offer its programs and to raise necessary resources for the ongoing preservation of the village. The board development component cannot wait as HSI's Board of Directors must select a new President in December 2021, and identify and cultivate prospective board members who will carry the organization forward in its governance as current board members complete their final board terms. It is critical to HSI's survival and growth that HSI have a full roster of board members able to provide leadership continuity after these members leave.

6. How much funding is sought? How does this compare to your annual operating budget and this years' projected deficit? What is the expected timeframe for use of funds?

Historic Sugartown respectfully requests \$11,500 for its Strategic Planning Project. Historic Sugartown's approved annual operating budget for FY 2020 is \$341,000. Our revised projections are that our total income for the year will be \$289,000, and expenses will be \$316,650. Our year-end deficit, without the PPP Loan of \$35,000, is projected at \$27,650.

Project Budget	Consultant	Budget Amount
Strategic Plan Development	Sylvia & Carter & Associates	\$6,000
Financial Health & Benchmark Assessment	Lorri Sarosy, MBA	\$1,500
Board Development	Sylvia & Carter & Associates	\$2,000
Fund Diversification Strategy	Lorri Sarosy, MBA	\$2,000
	Total	\$11,500

Expected Timeframe: The project is expected to take 6-8 months and will have four phases.	
Phase I - Develop Project Plan and Initial Information Gathering	December 2020 – January 2021
Phase II - Gather Community Feedback & Financial Health Assessment	January - February 2021
Phase III - Develop Strategic Plan and Funding Diversification Strategy	March – May 2021
Phase IV - Board Development	May & June, and continuing on ongoing basis

Pending funding, HSI will commence the project in December with an initial meeting of the Steering Committee to develop the project plan and commence information gathering to support the project. This will include the identification of key constituents for future interviews and focus groups. This part of the project will be simplified by the fact that consultant Connie Carter worked with HSI on a Development Audit in 2016, and is already familiar with the organization. Requested financial information will be gathered and provided to the financial consultant, Lorri Sarosy.

Community feedback will be solicited through interviews, focus groups and online surveys by the end of February. The Financial Health & Benchmark Assessment will also be completed at this time. Based on the collected community feedback and financial health assessment, Sylvia & Carter & Associates will compile a comprehensive report to inform the planning process to take place during March – May. The Strategic Plan, including the tactical plan, will be developed based on meetings with HSI's Board of Directors and staff, and through committee work. The development of a Funding Diversification Strategy will be formulated in tandem with the strategic planning process. Once completed, the Strategic Plan will help inform needs for the subsequent board development process.

Please e-mail all materials as a word.doc and/or pdf to grants@chescocf.org:

X	This Innovation & Resiliency Fund Grant Request cover sheet & brief narrative
X	Current annual operating budget & most recent audit
X	501c3 determination letter
X	Current strategic plan. If none, explain why your nonprofit doesn't have a plan. <ul style="list-style-type: none">• HSI's 2015-2017 Strategic Plan
X	Support materials that strengthen the urgency of this funding request + indicate that your nonprofit is innovative and resilient (ie: COVID best practice research findings, consultant proposal/s, bids for COVID-related materials & equipment, etc.) <ul style="list-style-type: none">• Sample Materials from HSI's Book Bindery's Virtual Book Restoration Workshop• Proposal & Company Profile - Sylvia & Carter & Associates• Proposal & Resume – Lorri Sarosy

- Proposals will only be accepted by e-mail, on this grant form available at <https://chescocf.org/covidgrant/>
 - Receipt of grant proposals will be confirmed by e-mail.
 - Grant proposals will be posted on the Community Foundation's website, in order to share with fund advisors, donors, grant panelists, and other funding sources.
 - Grant proposals will be reviewed weekly.
 - We estimate grants awards will range from \$5,000 to \$50,000.
- For awarded grants, a written report on use and impact of this funding will be due within 6 months.

Please direct questions about **ChesCo Nonprofit Innovation & Resiliency Grants** to

Chester County Community Foundation
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West Chester, PA 19382

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