

# I. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL SUMMARY SHEET

**One page only.** This page will be shared electronically with Grant Panel Members & Fund Advisors.

Note: If Philanthropy Network's Common Grant Application is used, CCCF's **Summary Sheet MUST accompany application.**

To obtain an electronic version of this application, visit [www.chescocf.org](http://www.chescocf.org)

**Date: Sep. 15, 2021**

## Contact Information

Organization Name: Citizen Advocacy of Chester County  
Address: 400 Franklin Ave., #226, Phoenixville PA 19460

Phone: 610-933-1299

Website: [www.CitizenAdvocacyCC.org](http://www.CitizenAdvocacyCC.org)

Year Incorporated: 1980

FEIN: 23-2117795

ED/CEO Name: Moira Mumma

ED/CEO E-mail:

[moirafm@citizenadvocacyCC.org](mailto:moirafm@citizenadvocacyCC.org)

Board Chair Name: Sarah Thompson

Board Chair Approval (check here):

Primary Contact Name: Moira Mumma

Primary Contact E-mail: see above

## Organization Information:

### Field/s of Interest:

Arts, Culture & Humanities

Environment/Animal Welfare

Education

Health

Human Services

Religion

**Mission:** Citizen Advocacy is a relationship-based form of protection and advocacy for people with disabilities – a way to promote, protect and defend the welfare and interests of, and justice for, people with disabilities who are diminished in status or seriously physically or emotionally isolated or at risk in other ways.

**Geographic Area Served** Northeastern Chester County

**Describe Population Served & Annual Number of People Served:** Citizen Advocacy matches voluntary advocates with people who have cognitive and/or physical disabilities and are isolated and vulnerable. This year we have supported 47 matches.

<b>Annual Budget</b> \$ <u>200,727</u> for current fiscal year	<u>1.75</u>	# of Full-Time Equivalent Paid Staff
<u>85</u> % of budget for program expenses	<u>12</u>	# of Board Volunteers
<u>4</u> % of budget for administrative expenses	<u>85</u>	# of Active Non-Board Volunteers
<u>11</u> % of budget for fundraising expenses	<u>950</u>	# of Volunteer Hours (advocates not included here – we have 47 advocates and very deliberately do not count or codify their time)

**Top 3-5 funding sources:** Individual contributions, Community Coalition, Annual Theater Event

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

### **If Capacity Building Proposal, the focus is:**

Mission, Vision & Strategy  Governance & Leadership  Partnerships & Collaborations

Fundraising, Development & Marketing  Technology  Other: combo of Strategy & Operations

**Grant Amount Requested from the Community Foundation:** \$ 4765

**Proposal Summary:** We are seeking funds to hire consultants for strategic planning which will include a succession planning road map, and to hire an organizational development consultant to help us further sort through and design HR and staff management plans and operational streamlining.

## II. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL NARRATIVE

*Provide clear, concise information. 3 pages maximum.*

### 1. Nonprofit's history, goals, key achievements & distinctiveness

**History:** In 1977, a concerned group of Chester County citizens began discussing the need to develop ways to better insure that people with developmental disabilities did not “fall between the cracks” – become excluded from community resources and become socially isolated and endangered. After reviewing various advocacy models, the principles of citizen advocacy were accepted, and a citizen advocacy program was incorporated in 1980. Through local fundraising and a start-up grant from the Developmental Disabilities Advocacy Network, a part-time program was begun in 1982. With support from the Developmental Disabilities Planning Council, the program became full time in 1985. In 1987, the program was moved to Phoenixville where it has grown and become an important part of the local communities.

**Goals:** The primary goals of Citizen Advocacy of Chester County are **to support the existing matches** and **to initiate new matches**. We do this in the context of the five basic Citizen Advocacy principles, which we strive to adhere to in all elements of the organization. These principles are all aimed at initiating matches that are as independent as possible from conflicts of interest and in all ways conscious of creating and supporting positive images of and realities for people who have disabilities. This year we supported 47 matches, and we hope to make eight new matches each year. Since the program's inception we have initiated and supported 282 matches.

**Key Achievements:** Programmatic achievements are in the stories of those we have introduced into long-term relationship. A small sampling: recently, one woman who lives in a nursing and cannot move or speak, broke her hip and was taken to the hospital. No one in the nursing home went with her - the medical staff assumed she didn't speak out of belligerence, and it was not until the advocate arrived and was able to explain the situation that she received proper care. Another advocate arranged for COVID vaccinations for his partner's entire family as they do not speak English and thus weren't sure how to access the shots. Another advocate has arranged and paid for extensive dental care for her partner. Another is helping her legally blind partner access doctors who have treated her with newly developed glasses and eventually contacts, to improve her sight. In just the last six months one partner facing eviction and another living in a shabby hotel room in Spring City found safe new apartments and were helped to move in through the help and hard work of their advocates.

In a broader sense, a key achievement is reaching our 40 anniversary with our program continuing to successfully carry out our mission and principles, changing the lives of both advocates and their partners in our county.

**Distinctiveness:** Citizen Advocacy is profoundly unique in one fundamental way: it is based completely on the belief in the power and competence of the ordinary citizen. It depends on the ability of individuals to care and connect to others and to make lifelong voluntary commitments to step in and sometimes work extremely hard for and with someone they would not ordinarily meet. The great impact of this model is that voluntary citizens do the work - change is put into the hands of the community. Advocates are there for the long haul, they deal with issues across the full spectrum of human need and they are free from conflict of interest to fully focus on their partner's best interests. Paid social service

staff cannot provide this because they must meet the needs of so many people, and because their loyalty is tied by their paycheck to their employer, not to the person they serve.

## 2. Funding request, for a Capacity Building Grant

### • Description of key initiatives – the needs and issues to be addressed

- A. Strategic Planning. Our last three-year strategic plan was designed to cover 2018 – 2021. With the advent of the pandemic, we created an abbreviated one-year contingency plan to cover 2021 (both are included in our attachments). With the start of our fiscal year 2022 this October, we want to build a new three-year strategic plan. We have contracted with consultant Pam Bryer to lead the initial phases of creating the roadmap and overall timeline for this strategic plan, and she has begun working with our board and staff.
- B. Succession Planning. Our Executive Director has worked at Citizen Advocacy for 34 years and is looking at a responsibly phased retirement. The organization recognizes this and sees the next three years as a frame for that process. Board and staff also recognize that they will need help and outside facilitation to assess the roles of the remaining staff and create a succession plan that best serves the organization.
- C. New Management Structure/Division of Duties. This leadership transition among staff has made clear that the organization would also want outside expertise to help with reconfiguring staff roles and to look with fresh eyes and an open mind at how to structure responsibilities. This will also include assessing a number of operational areas such as bookkeeping and administrative responsibilities. The goal will be to look at increasing efficiencies, and to look at where we may want to have new positions created and old ones redefined. This will also involve a fresh look at how much time staff will spend in the office as opposed to working from home.
- D. Creation of systems that reduce dependence on the routines, habits and culture of the long-term staff and board members. The program work of Citizen Advocacy is clearly defined and much is written about how to best perform the work. Our governance and policy structures are strong. But the other aspects of the organization – fundraising, network building and building community standing – rely on the long-term routines of dedicated staff, board and committee members. We realize the risk this runs and would like to find ways to make much of this essential activity more institutionalized, rather than to continue depending on a number of individuals just ‘doing what they do.’ We are fortunate to have many people doing many things well, but we need to find ways to turn their activity into knowledge that can be understood and transferred. We have a strong 40 year history, and in this time of transition we don’t want to waste that and have to reinvent the wheel. We will need consulting help identify and capture this broad institutional memory for ongoing use.

### • Why it is important to fund this now?

There are two primary reasons why this work is so critical right now.

One is the retirement transition of our long-term Executive Director, and the imperative to have a responsible transition plan in place. To do this right, we will need to thoroughly look at current and potential future staffing and organizational management, and we want to ensure that her institutional knowledge is also captured and the leadership transition smooth.

The second main reason is the expiration of our existing strategic plan. The timing of a new plan also corresponds to our need/hope to transition out of the pandemic and all of the changes that it has brought about. While our work did not change, much about the way we went about accomplishing it did. While most of this constituted creatively overcoming hurdles, some changes revealed ways in which things could improve – moving to a smaller office, holding some meetings and trainings on zoom – and we hope to incorporate some of this into the new plan.

**• What will be the impact of this work impact & and how will results be measured?**

The main impact of this work will be having a solid roadmap to guide the program through its most important leadership transition since its founding over 40 years ago. This prospect has woken up board and staff to critical importance of doing everything possible to both capture and institutionalize what has worked in the past, and to ensure for existing staff that the transition is a smooth and healthy one. All recognize that with outside help we can also take a fresh look at the staff structure, management and the operations side of the business and take them to a new level.

The result will be measured in the short term by the completion of a new strategic plan, and the participation of board committees in drafting and owning the different parts of it. Longer term success will be measured in how the plan is carried out over the next three years. At the end of that time, there should be a new executive director, new roles defined and filled for staff, a fresh management structure, new operations procedures and personnel, and a capturing of institutional memory into tangible and teachable knowledge.

Our first board and staff retreat led by consultant Pam Bryer takes place this Sunday, September 19. And in the very short term, the result from that will be the roadmap and timing for having a strategic plan completed. We can certainly follow this grant application up with that as soon as it is completed – it's an essential first result!

**• Timeline & costs to implement the initiative. Estimate of anticipated costs & expertise of the consultants to be hired**

The timeline will be hammered out in detail this Sunday, but there is a general sense that the plan will be completed by year end – that will involve working with several consultants this fall in addition to Pam Bryer, who are experts in different areas succession planning, management structure and HR.

Pam Bryer, MPH, CRFE is contracted to do 20 hours of work with us (see contract attached) to build the initial roadmap. Her fee is \$100/hour. From there we will be able to identify which other consultants we will recruit for the different areas. We have had conversations with several others, and Clemens Pietzner has already agreed to provide his services in the areas where we can use him. Some of the consulting work will be donated but we are estimating having to pay for roughly 25 more hours of work at \$100/hour, in addition to the 20 hours by Pam Bryer, that will bring our costs to \$4500. Retreat rental space for the strategic planning session and ongoing supplies for other consultants brings our estimate to \$4765.