

GRANT PROPOSAL GUIDELINES

- We **connect people who care with causes that matter, so their philanthropy makes a difference now & forever.**
- We are a **collection of Field of Interest & Donor Advised Funds** with **@\$3.5M granted annually** to nonprofits in Chester County & beyond.
- **99%** of our grants are made by our generous Fund Advisors, who make grant decisions all year.

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

Field of Interest & Donor Advised Funds (No Deadline)

- ◇ Grants **focus on Chester County** causes & issues, but are not limited to Chester County.
- ◇ Charitable nonprofits working **in all fields of interest** are considered for grant awards. (I.e. arts, culture, & humanities; education; community improvement; environment; religion; health; & human services)
- ◇ **General operating** grants are encouraged. Nonprofits should be specific about their mission, goals, & measurable outcomes.
- ◇ Proposals can be submitted **anytime all year.**
- ◇ Grant decisions are made **intermittently** all year, as Fund Advisors desire.
- ◇ Grant **awards** typically range from **\$500-\$7,500.**

Fund for Chester County Capacity Building Grants (Due 9/15)

- ◇ For eligibility in this grant program, nonprofits must be **located in & serve Chester County.** NPO's with budgets of \$500,000 or less are given preference.
- ◇ The goal of capacity building grantmaking is to **strengthen the effectiveness of NPO's serving the Chester County region,** in areas including:
 - Mission, Vision & Strategy
 - Governance & Leadership
 - Partnerships & Collaborations
 - Operations & Technology
 - Fundraising, Development & Marketing
- ◇ Proposals must be submitted by **September 15** to be eligible for consideration.
- ◇ Grant **awards** typically range from **\$500-\$5,000,** with monies distributed by **February.**

- Use this form @ www.chescocf.org to apply online for grants from all Community Foundation Funds.
- **Email proposals to grants@chescocf.org**
- Proposals are considered "complete" when CCCF has **confirmed** receipt of the **Grant Proposal Summary Sheet, Narrative & Attachments.**
- Proposals are shared electronically and online with Fund Advisors, Donors & Grant Panels.
- Per IRS Regulations, applicants **must be** charitable, tax exempt organizations with 501(c)(3) certification & **cannot** be individuals.

Please contact Grants Administrator **Kevin Baffa** at **(610)-698-8211** or grants@chescocf.org with any questions.

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

Date

Contact Information

Organization Name: Barclay Friends	ED/CEO Name: Linda Sterthous
Address: 700 N. Franklin Street, West Chester, PA 19380	ED/CEO E-mail: lsterthous@bf.kendal.org
Phone: 610-696-5211	Board Chair Name: John Braceland
Website: https://bf.kendal.org	Board Chair Approval (check here): <input checked="" type="checkbox"/>
Year Incorporated: 1893	Primary Contact Name: Dave Raible
FEIN: 23-2088476	Primary Contact E-mail: draible@bf.kendal.org

Organization Information:

Field/s of Interest:

<input type="checkbox"/> Arts, Culture & Humanities	<input type="checkbox"/> Environment/Animal Welfare	<input type="checkbox"/> Education
<input type="checkbox"/> Health	<input checked="" type="checkbox"/> Human Services	<input type="checkbox"/> Religion

Mission: Barclay Friends has served as a Quaker-based continuing care community in West Chester, Pennsylvania for over 120 years. Our commitment to the West Chester community and the Quaker ideals we were founded on remain a vital part of our mission to continuously improve care of the aging across the continuum of services we provide. We aspire to the highest professional and humanitarian standards while providing care and services in a supportive, homelike, and compassionate atmosphere.

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

Describe Population Served & Annual Number of People Served:

Annual Budget \$ <u>17,950,274</u>	<u>138</u>	# of Full-Time Equivalent Paid Staff
<u>92</u> % of budget for program expenses	<u>18</u>	# of Board Volunteers
<u>7</u> % of budget for administrative expenses	<u>27</u>	# of Active Non-Board Volunteers
<u>1</u> % of budget for fundraising expenses	<u>2,392</u>	# of Volunteer Hours

100 % total

Top 3-5 funding sources:

Friends Foundation for the Aging, \$25,000
McLean Contributionship, \$35,000
Richard Schramm, private donor, \$30,047

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: _____

Grant Amount Requested from the Community Foundation: \$20,000

Proposal Summary: Barclay Friends is requesting funding from funds of the Chester County Community Foundation for three main initiatives: our Caring Fund (supporting the lifelong care of our residents with income below the poverty line); our Horticulture Program; and the purchase of a new, completely accessible bus to use for excursions for our residents.

II. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

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

Founded in 1893, Barclay Friends is a non-profit community for older adults dedicated to upholding each resident's independence and dignity with quality, compassionate care. Quaker values are reflected in the compassionate care we provide. Our dedicated caregiving staff strive to honor the spirit, humanity, and basic rights of the older person. We recognize each resident's need for independence and self-determination, the need to feel connected, and the need to have opportunities for learning, fun, reflection, and self-expression.

Dedicated and caring staff have always been at the heart of Barclay Friends' community. Staff engage with and provide support for residents in a respectful and kind manner. Time and time again, families of residents express their gratitude.

"This new chapter in Mom's life at Barclay Friends was nothing short of lovely, beautiful and comforting. She was always surrounded by caring staff, whether it was the well-trained nursing staff, the incredible dining crew, the illustrious recreational and horticultural team members, or the esteemed leadership team. Mom recognized that she was always treated with respect and great care."

-Grateful Former Family Member (Mother was on Medicaid)

Since 1997, Barclay Friends has provided a home to over 4,000 older adults nestled within a West Chester neighborhood with access to eight on-site gardens. Throughout the past 24 years at this location, our community has offered residential and personal care as well as skilled nursing long term care and post acute rehabilitation care for guests in need of short-term care after surgery or another setback. At any given time, we have between 110-150 residents.

Among the Greater West Chester community that we serve, Barclay Friends has earned a reputation of enriching lives and providing quality care for our residents. Here are some of the ways that we demonstrate our commitment to residents:

- Residents are never asked to leave if they expend their resources; Barclay Friends provides financial support through our Caring Fund for both people in personal care and skilled nursing. Our community accepts Medicaid, and about 30% of our skilled nursing residents (about 30 individuals) receive Medicaid. Barclay Friends covers up to \$2 million each year in resident care costs, due to the difference between the cost of quality care we provide and the rate of Medicaid reimbursement.
- Our innovative model blends homelike surroundings with state-of-the-art medical care.
- A unique horticultural therapy program instills a sense of purpose and enriches lives through activities around flowers, gardening and access to beautiful gardens throughout the campus.
- Our affiliation with The Kendal Corporation (since 1994) provides continuous support in many critical areas, including finance, project development, marketing, and philanthropy.
- A new residence called Preston was opened in August 2020 to offer personal care and memory care with 60 apartments. A successful capital campaign raised \$1.5 million to help offset the costs to construct the new building. Despite the many challenges brought on by COVID-19, we have almost 50 residents currently living in Preston.

2. Funding request

- **Description of key initiatives**
- **Specific needs & issues to be addressed**
- **Why it is important to fund this now**
- **How impact & results will be demonstrated**

- *For capacity building grant proposals:*
 - *How will this capacity building initiative impact your nonprofit?*
 - *How will this impact be measured?*
 - *Include a description of the expected activities; timeline & costs to implement the initiative. If external consulting services are required, include the anticipated costs & expertise of the consultants to be hired. Include external consultant proposals if applicable.*

Barclay Friends requests funding for three distinctive initiatives that will improve the lives of our residents: strengthening our Caring Fund, which helps to fund the cost of care for residents with incomes below the poverty line; supporting our unique Horticulture Program; and helping to fund the purchase of a new bus to take residents (including those using wheelchairs) on local outings.

Barclay Friends currently has 70 residents in skilled nursing and rehab (out of 96 beds in our Cotter building) and 47 in Personal Care and Memory Care (out of 60 apartments in our Preston building). The average age of our residents is 88 years. In 2020, we served a total of 225 individuals (residents and short-term rehab guests). More than 30% of our resident population relies on Medicaid to cover costs, a financial source that does not fully cover the cost of care each day. No resident is ever turned away when their finances are exhausted, thanks to our Caring Fund.

The Caring Fund enables Barclay Friends to make a commitment to our residents: that they need not worry about their future security. Our residents and their families will never be put into a situation in which they must move to another community, especially as residents who are supported by our Caring Fund have incomes below the poverty line and would have few options for care. Our Quaker values call us to treat every resident with the compassion, respect, and generosity that they deserve.

Barclay Friends' Horticulture Program is a distinctive activity which provides our residents with access to extensive community gardens and instruction. Gardening is an activity which is proven to enhance physical and mental well-being, which is especially valuable to seniors, particularly during a pandemic when social contact may be limited. Our grounds include eight outdoor garden areas open and accessible to residents and their families, raised beds, active gardening opportunities (such as seed starting, flower arranging, and garden maintenance), entry of vegetables and flower arrangements into the annual Goshen Fair, and the growing of food to donate to the local food bank. Our residents grew and donated 540 pounds of fresh produce last year, giving them an exceptional sense of giving back.

The COVID-19 pandemic has been a difficult time for senior living communities, as older persons are among the most vulnerable populations affected by the virus. Keeping our residents and staff safe has been our topmost priority during the past year and a half. However, the social isolation and distancing guidelines we have needed to observe to stay safe have been difficult on our residents as the variants of COVID-19 continue to evolve and spread. Social connection and external stimulation are extremely important factors in the health and well-being of seniors.

Fortunately, in January of 2021, Barclay Friends residents and staff were among the first in our area to receive the Pfizer vaccine. Vaccination allowed our residents gradually and safely to engage with one another and with the outside community.

For many years, Barclay Friends has offered our residents a bus to take them on regular trips and outings. This transportation has been an important element of our program to help residents connect with the outside world. For example, residents have recently visited Elmwood Zoo, Marsh Creek, and Highland Orchards, just to name a few. With visits to local parks, residents have the opportunity to sit outside and enjoy a picnic with fellow residents. Some residents have treasured the opportunity to take a scenic ride through their old hometown and by old familiar locations they frequented when younger. Recreation staff have also hosted scenic tours during which they present nature or culture talks to participating residents.

Our current bus was gifted to us by our friends at Kendal Crosslands Communities in Kennett Square. While we were grateful for their donation, the bus is too small for our current needs, does not have adequate space to accommodate individuals in wheelchairs, and lacks storage for wheelchairs. In addition, with the recent opening of the Preston personal care building, the number of outings has increased as new residents have joined our community. Our goal for the coming year is to purchase a new bus that will seat 14 passengers comfortably, and which will have a number of benefits:

- Easy to drive (no commercial license needed) with a small wheelbase for easy turning
- Electric door, entry steps, and a wheelchair lift
- Wide aisle and comfortable individual seats
- Wheelchair securement system
- Storage in back for wheelchairs and other items
- Air conditioning
- Audio-visual equipment for communicating with passenger
- Backup camera and other safety equipment
- 5 year/100,000 mile warranty.

With a new and larger bus, we look forward to being able to host more residents on outings, including more individuals who use a wheelchair. We have a funder which has generously agreed to support the cost of roughly half of the necessary expenses to purchase this customized vehicle, and are now seeking additional funders to join this effort so that we may make the purchase soon.

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 & financial statement, audited if available
4. Itemized organizational operating budget with actual results for prior fiscal year & 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.

- Use this form @ www.chescof.org to apply online for grants from all Community Foundation Funds.
- **Email proposals to grants@chescof.org**
- Proposals are considered "complete" when CCCF has **confirmed** receipt of the **Grant Proposal Summary Sheet, Narrative & Attachments**.

- Proposals are shared electronically and online with Fund Advisors, Donors & Grant Panels.
- Per IRS Regulations, applicants must be charitable, tax exempt organizations with 501(c)(3) certification & cannot be individuals.

Please contact Grants Administrator Kevin Baffa at
(610) 696-8211 grants@chescof.org with questions.

