

GRANT PROPOSAL GUIDELINES

- The Chester County Community Foundation **connects people who care with the causes that matter**, so their philanthropy makes a difference **now & forever**.
- We are **a collection of Field of Interest & Donor Advised Funds** with **\$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 9/11)

- ◇ For eligibility in this grant program, nonprofits must be **located in & serve Chester County**.
- ◇ Nonprofits **budgets** must be **\$500,000 or less**.
- ◇ The goal of capacity building grants is to **strengthen the effectiveness of NPO's serving the region**, see page 4 for more details on the areas including:
 - Mission, Vision & Strategy
 - Governance & Leadership
 - Partnerships & Collaborations
 - Operations & Technology
 - Fundraising, Development & Marketing
- ◇ Proposals submitted between **July 1 - Sept. 11** are 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) 696-8211** 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 2/17/25

Contact Information

Organization Name: Barclay Friends

Address: 700 N. Franklin Street, West Chester, PA 19380

Phone: 610-696-5211

Website: www.bf.kendal.org

Year Incorporated: 1893

FEIN: 23-2088476

ED/CEO Name: Maria Santangelo

ED/CEO E-mail: msantangelo@bf.kendal.org

Board Chair Name: Ellen C. Gilbert

Board Chair Approval (check here): X

Primary Contact Name: Glenn Barnhill

Primary Contact E-mail: gbarnhill@bf.kendal.org

Organization Information:

Field/s of Interest:

☐ Arts, Culture & Humanities

☐ Environment/Animal Welfare

☐ Education

☒ Health

☒ Human Services

☐ Religion

Mission: Barclay Friends' mission is to provide a continuum of services to older adults, with a focus on compassion and kindness, excellence, and continuous improvement. The Quaker values on which we were founded influence the dignified, caring services we provide and our interactions with the external community. We are continually adapting to best serve the changing needs of the seniors who live in our inclusive, compassionate community.

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 \$17,457,131

150

of Full-Time Equivalent Paid Staff

80 % of budget for program expenses

14

of Board Volunteers

20 % of budget for administrative expenses

20

of Active Non-Board Volunteers

<1 % of budget for fundraising expenses

750

of Volunteer Hours

100 % total

Top 3-5 funding sources: McLean Contributionship, Crystal Trust, M&T Charitable Foundation.

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: \$7,500

Proposal Summary: Barclay Friends is transforming our services to meet the rising need of residents with memory loss. This has motivated the complete remodel of our Goshen neighborhood in the Cotter Building to become units for memory care patients. We are also investing in dementia training for all employees and technology that will provide enrichment and interaction for our residents. Our Caring Fund is an important part of our mission, as it funds the ongoing care of residents who can no longer pay for our services. Finally, we maintain several of our recreational programs, such as our horticulture program, with philanthropic dollars. These programs enrich the lives of residents and give them an opportunity to give back to the larger community.

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. Although originally founded by Quakers to serve their own elders, today Barclay Friends serves a diverse population from all religions, races, ethnicities, backgrounds, and lifestyles. Barclay Friends is a member of the Kendal system, a group of 10 affiliate organizations in eight states nationwide dedicated to providing quality care for older adults.

Since 1997 at its current location, Barclay Friends has provided a home to over 4,000 older adults from a facility nestled within a West Chester neighborhood with access to eight on-site gardens. Throughout the past 28 years, our community has offered residential and personal care as well as memory care, 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 about 145 residents.

Barclay Friends has earned a reputation for quality personal care, memory care, and skilled nursing care, maintaining a continuous pursuit of excellence in senior care despite many changes in social and economic conditions and demographic shifts. The community is rated 5 Stars by the Federal Centers for Medicare and Medicaid Services and is accredited by the Joint Commission.

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 is a caring, compassionate home for the seniors who live here. Our staff are trained to provide a high level of care that meets our residents where they are and supports them with the Quaker values of empathy and dignity. In addition to compassionate and skilled nursing care, Barclay Friends offers a wide range of enriching activities to our residents, including regular cultural and recreational excursions in our wheelchair-capable bus, a horticultural and gardening program to keep residents

engaged with the natural environment, and volunteering opportunities to keep them meaningfully connected with the outside world.

Barclay Friends is at the forefront of workforce development efforts to ensure that senior living communities regionally have a pipeline of skilled, compassionate people ready to meet the needs of our area's seniors. Our Certified Nursing Assistant (CNA) program has now "graduated" 24 individuals, all of whom have gone from entry-level positions here to better-paying CNA positions at Barclay Friends or other senior living communities. We are committed to ensuring both a sustainable workforce for our sector and a path of career advancement for those who come to work here in entry-level housekeeping, food service, or secretarial roles. In addition to the practical training we provide, we infuse all of our CNA training with our values, which will help to ensure that, whether they remain with Barclay Friends or choose to work elsewhere, they will take with them the values of respect and compassion that we foster.

Senior care providers like Barclay Friends face an array of challenges apart from workforce challenges, many of which have been accelerated and exacerbated by the pandemic. Healthier patients are going home after hospital stays and the ones coming to nursing homes are far more compromised and have a greater cost of care than in years past; reimbursement rates from third party and governmental sources are not keeping pace with inflation and are often far lower than the cost of care; an acute labor shortage, especially in the nursing profession, has created a supply and demand imbalance thereby creating a need to raise wages and causing a reliance upon costly agency staffing. These challenges, along with our commitment to care for residents who have exhausted their financial resources, places a financial burden on Barclay Friends that can only be addressed through a conversion to a more balanced operating model. The cumulative effect of these challenges has put significant pressure on Barclay Friends' financial position, such that we have not met debt covenants, requiring our auditors to recharacterize our debt as a current liability and to issue a Going Concern Opinion.

Aiming to address these challenges, Barclay Friends retained the consulting services of OnePoint Partners, a highly respected strategic advisory services firm in the senior care sector. After months of extensive study and collaboration with Barclay Friends' Board and management, OnePoint Partners offered a recommended set of strategic changes to ensure that Barclay Friends continues to lead with compassionate care and kindness, while substantially improving its long-term financial outlook. These changes are market driven and entirely mission aligned.

Our plan, as recommended by OnePoint Partners and endorsed by Barclay Friends' Board of Directors, is to convert one Cotter neighborhood of 32 skilled nursing beds to 24 personal care/memory care apartments. While this conversion will involve no changes to the building's footprint, it will increase the number of available memory care apartments in the community, thus better meeting the current and expected future needs in the marketplace. The existing 20 memory care apartments in the Preston building filled up quickly when the building opened in 2019 and have remained continuously full with a waiting list since then.

Market analysis confirms that there is a strong demand for additional memory care apartments in our area. Additionally, these 24 converted apartments will have lower staffing needs than the prior 32 skilled nursing beds, thereby addressing the continuing labor shortage and reducing reliance on high-cost agency staffing. After the conversion is completed, Barclay Friends will be in a better financial position

and in a better position to meet the changing needs of our residents, especially those with the highest levels of medical and financial need.

According to the detailed financial analysis done by OnePoint Partners, this project will greatly strengthen Barclay Friends' financial position within one year of project completion, by providing a service that is in greater demand by today's seniors, reducing operating costs, and reducing dependence on government funding sources. We have funding in place from several private funders to cover the cost of renovations and are awaiting a decision from a federal funder. Whatever we cannot raise from these sources we will cover from our reserves, in recognition of the critical nature of this project for Barclay Friends' future. The renovation has been taking place throughout 2024 and will be complete early in 2025.

While the physical renovations of the Cotter building are the largest part of the work Barclay Friends is doing to prepare for our future, there are other essential elements of this transformation. One is the planned training of all Barclay Friends employees to care for people with dementia. We plan to conduct this organization-wide training in 2025.

We have also invested in technology to care for residents with memory loss, by purchasing a system called Tovertafel. Tovertafel is an award-winning system for people with dementia and intellectual disability: a projector with interactive, easy to use controls and a wide variety of games that our residents can participate in along with their caregivers. Dozens of games are available at varying levels of skill, so care staff can choose the best ones to develop or retain abilities for each individual resident. The games can be played with visiting family members and friends as well as with care staff, and have been proven to positively impact cognitive function for users. Barclay Friends purchased our first Tovertafel unit in 2024 and has been extremely pleased with its positive impact on our residents. We have requests outstanding to two private funders to empower us to purchase two additional units, which will make the benefits of this innovative technology available to all of Barclay Friends' residents.

As we work to transform our facility to best meet the needs of local seniors, we must also work to ensure that our current residents enjoy the sense of safety and permanence they need. Barclay Friends has long had a commitment to serve those in our community who experience economic hardship. About 30% of our current skilled nursing residents have outlived their financial resources and are on Medicaid. It is fundamental to our mission to absorb the cost of this care, which can be as much as \$2 million per year. Families of residents greatly appreciate that their loved ones continue to receive quality care and support, even when they become unable to pay privately to live at Barclay Friends. Our Caring Fund, which provides this ongoing support, is the heart of our mission as a nonprofit care community.

For the year to come, we expect to achieve the following objectives:

- Open the new Memory Care facility in our Cotter building and settle in its new residents.
- Conduct Dementia Training for all Barclay Friends staff in preparation for the change in our facility's demographic composition.
- Purchase two new Tovertafel units and train Barclay Friends staff on their use.

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.

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