



Grant Proposal prepared for **Friends Foundation for the Aging**

I. Executive Summary - include amount requested, brief summary of problem, objectives and plan (theory of change). Maximum 100 words.

SCS respectfully requests \$20,000 to support activities that will lead to greater equity and inclusion in the Caregiver Support Program, increase the program's caseload, and develop a caseload that better reflect Delaware County's cultural diversity. Presently, 80% of the program's participants are non-Hispanic white individuals, who make up roughly 60% of the county's population. To promote greater participation in the program among Delaware County's BIPOC residents, SCS will expand marketing, communications, and targeted outreach efforts to institutions and community organizations trusted by people of color, translate documents into foreign languages, and improve the cultural competency of staff.

II. Brief statement of the organization's history and competence for this effort. In order to advance equity, please include a description of the diversity of your organization's leadership staff, board and people served. Maximum 100 words.

SCS has led Delaware County's aging services network for over 40 years by providing in-home and community-based services. SCS seamlessly integrates modern care management practices with the Caregiver Support Program to meet the complex needs of caregivers and care receivers throughout their demanding, but rewarding, caregiving journey. SCS staff members administer government-funded reimbursement programs, host emotional support groups, and present educational seminars, all of which are highly rated by participants. SCS' leadership team and board of directors match the diversity of the county's population with regard to race, age, gender and sexual orientation.

III. Project details- Maximum 5 pages

1. What problem are you addressing? Evidence of needs, why this solution chosen/evidence, description of community and people to be served.

Over the last three years, members of SCS' management team have participated in the Pew Charitable Trusts' Evaluation Capacity Building Initiative (ECBI), receiving a graduate-level education in program design, execution and evaluation. In the course of this work, SCS' ECBI team studied the Caregiver Support Program caseload for several years to examine the program's impact on participants and the financial and non-financial benefits it provides caregivers. The program's disparate impact on white people and people of color emerged, bringing to the surface an equity and inclusion issue that SCS is now seeking to correct. It is important to SCS (and to Delaware County's Office of Services for the Aging, which recently awarded SCS a five year contract to continue administering the Caregiver Support Program) that the program's beneficiaries better reflect the demographics of Delaware County and that all participants experience the key benefits of the program – relief from financial strain and relief from stress.

According to the United States Census Data the Race and Hispanic Origin percentages of the county are as follows:

- 68.5% White alone
- 22.7% Black or African American alone
- 0.2% American Indian and Alaska Native alone
- 6.3% Asian alone
- 0.1% Native Hawaiian and Other Pacific Islander alone
- 2.2% Two or More Races
- 4.1% Hispanic or Latino
- 63.6% White alone, not Hispanic or Latino

SCS has spent the last two years collecting and analyzing data, conducting surveys, and studying best practices in caregiver support. With the discovery of this disparate impact of the program on caregivers in our community, SCS is committed to taking necessary steps to administer the program more equitably. The program's eligibility requirements and funding ceilings recently changed when Governor Tom Wolf signed Bill 464; SCS' equity and inclusion initiative aligns with the arrival of increased funding capacity to serve more individuals and greater flexibility in determining who is eligible for the program.

2. What action(s) will you take?

In order to better reach and serve communities of color, SCS' marketing and communications team will work with Caregiver Support Program supervisor and care managers on the following actions:

1. identify trusted institutions and people in minority communities,
2. develop promotional materials in languages spoken by residents of those communities,
3. examine our practices to determine their cultural competency.
4. rebuild the Caregiver Support Program's Advisory Council, which has been diminished by the pandemic. This council will allow the voices of caregivers and their allies to be heard at every level of the program.

Federal and state funding have encouraged and supported the production of materials in Spanish for many years. For other languages, SCS will reach out to translation services to translate existing documents. In addition to printed materials, SCS will develop sample social media posts and other multilingual copy for

partner organizations and individuals in minority communities to draw inspiration from or to use as is when communicating with their constituents.

SCS believes these actions will help the agency develop a reputation as a trusted partner in these communities, identify a broader and more diverse pool of eligible participants, eventually resulting in the program's reimbursement pool is distributed in a more equitable fashion and that the program's emotional support groups and education programs are more inclusive of caregivers from diverse cultural backgrounds.

3. What other organizations will you partner with on this project?

SCS has long been noted for its openness and effectiveness as a collaborator. SCS' Caregiver Support Program has collaborated with many community partners over the last decade. Key mental health partners include Merakey (formerly Northwestern Human Services (NHS)) and the Delaware County Office of Behavioral Health. Delaware County's major healthcare systems – Crozer Health, Main Line Health and Trinity Health Mid-Atlantic Region – are important resources for outreach and referrals, as is the county library system, the United Way, and the offices of state legislators.

SCS also anticipates working with a host of county-level partners to identify people in need of caregiver support. Besides COSA, which is our most frequent source of referrals, SCS anticipates working closely with the new Department of Public Health, as well as the Department of Human Services and the Office of the District Attorney (caregivers are often preyed upon by scam artists), and Community Transit.

Homecare providers, elder law attorneys, neighborhood advisory councils, municipalities, nursing homes, and faith-based institutions are potential partners to host events, provide referrals, or participate in education programs. The agency's four senior centers – and the senior centers operated by Surrey Services, Wayne Senior Center and Upper Darby Parks and Recreation – are also strong partners.

4. What outputs (measurable, specific) do you expect?

SCS expects an increase in the number of people of color applying for and receiving caregiver benefits such that a minimum of 40% of the reimbursement pool reaches caregivers of color within three years. During that same time period, SCS seeks to match the program's demographic profile with the county's overall demographic profile. SCS hopes to reach a caseload of 200 caregivers, almost double the current caseload, over a three-year period as a result of these efforts. (Reaching a caseload of 200 would restore the program's census to its peak levels.

Additionally, as SCS collects and analyzes data from caregiver assessments, the agency expects to observe a decrease in self-reported stress levels. Caregivers are asked to report on the level of stress they are experiencing as a result of their role as a caregiver in initial assessments and every six months throughout their participation in the program.

5. What outcomes do you expect? What change will occur, what impact will it have?

SCS' vision is to enable Delaware County seniors to enjoy greater health, happiness, and capacity to live independently. These goals lead to two sets of outcomes for the Caregiver Support program:

Program-level outcomes:

- A larger caseload that displays greater equity and inclusion;
- Broader range and increased frequency of non-financial programming;
- Referral materials and programming will be available in multiple languages;

- SCS will see a more diverse selection of community leaders serving as guides to the caregivers in their communities.

Consumer outcomes:

- Better self-reported physical and mental health: Individual caregivers will report lower levels of stress associated with providing care to their loved ones
- Greater capacity to cope with stress: Participants will report that they have greater capacity to cope with the stresses of caregiving as a result of participating in the program;
- Greater satisfaction in their capacity as caregivers: Caregivers will report higher levels of fulfillment because of their success meeting the needs of their care receiver.

By fostering equity and inclusion and providing assistance beyond financial support, SCS will meet the multi-faceted needs of caregivers throughout Delaware County in culturally appropriate and respectful ways.

6. How will you measure outputs and outcomes? Both quantitative and qualitative.

SCS will continue to measure stress levels and program participation through the administrative data collected at each care management visit and analyzed monthly. The administrative data includes a quantitative collection of stress level, which is reported as a number corresponding to levels of stress, and the care management visit always provides an opportunity for qualitative data collection. At the end of a three-year data collection and analysis period, SCS will determine if a survey to collect more qualitative data will be beneficial.

7. How will you sustain the project after the grant period?

After the grant period ends, SCS will advocate for sustaining the efforts of this grant with the Delaware County Office of Services for the Aging (COSA), as well as with the state and federal government. SCS views this program as crucial to addressing the hardships associated with caregiving. SCS has just entered into a five-year contract with COSA ensuring continued support for the Caregiver Support Program. The agency is confident that the process of launching this kind of change in a social support program is the hardest and costliest part of the process, but the tools, materials, community connections, and mechanisms are more readily sustainable and self-perpetuating once they have been established and are viewed as successful.

8. How will your results be shared and replicated?

SCS' leadership team has a long history of participating in the American Society on Aging's national conferences and sharing the success of our programs. This platform has a powerful reach and has ensured that Area Agencies on Aging across the country have access to the newest and most innovative approaches to aging. SCS has shared information about a number of its programs at past ASA conferences, including the Caregiver Academy and Aging at Home model programs. SCS' care management team members are viewed as thought leaders on the topic of providing educational resources to caregivers.

9. How does this project fit with Friends Foundation values? (read FFA values document)

This project directly aligns with many of the values of the Friends Foundation for the Aging, specifically:

- **Service to Diverse Populations:** The central value of this project demonstrates a commitment to diversity, equity, and inclusion. While SCS has historically placed people of color in staff and board leadership roles, the agency wants each of its programs to reflect the county demographics to ensure that the programs and services are reaching all the communities of color found in our county.
- **Potential to Create Change:** SCS' effort to advance the Caregiver Support Program towards equity will increase the reach of the program and create greater demand for support for caregivers. SCS will encourage caregivers and care receivers to share their stories with local, state, and national elected officials to influence state and federal policies with regard to caregiving. SCS' work with caregivers has uniquely positioned the agency as an advocate for Delaware County's caregivers at a moment when national policy is recognizing how important family caregivers are.
- **Leveraging of Resources:** SCS' fundraising team is constantly researching new leads and exploring new funding opportunities to keep the agency's financial portfolio diverse and therefore sustainable. As previously mentioned, SCS has just entered into a five-year contract with COSA to continue management of the Caregiver Support Program, a continuation of a long-time relationship with the county's Area Agency on Aging.
- **Collaboration:** SCS actively participates in the aging services network by employing the "no wrong door" policy. SCS and all of its partner agencies ensure that any Delaware County senior in need of assistance will be referred to the proper resources to meet their needs.
- **Engagement of Employees and Participants:** SCS invites employees at all levels, as well as program participants, to periodically engage with management through different Advisory Councils, committee meetings, and other open events. Hearing the voices of multiple groups of constituents SCS to respond effectively to their needs.
- **Integration of Services:** Whether a senior needs physical, social, emotional, intellectual, spiritual, or purpose-related support, SCS has something to offer. The Caregiver Support Program takes a three-pronged approach to aiding the county's caregivers, offering financial reimbursement for caregiving expenses, emotional support programs, and educational opportunities. This project focuses primarily on expanding the pool of people eligible for financial assistance, but also increases the probability of a caregiver participating in the emotional support groups, or the annual six-session Caregiver Academy (a series of educational seminars offered each spring that could be expanded into a year-round project).

Timetable

July, 2021	SCS begins new five-year agreement to provide care management services to caregivers through the Caregiver Support Program.
September, 2021	SCS seeks funding to improve the diversity, equity and inclusiveness of the Caregiver Support Program from FFA.
October, 2021	SCS Caregiver Support Program staff begin outreach to community organizations to solicit participation on the Community Advisory Council. Staff begins to develop marketing materials and to engage with partners to translate materials/develop culturally competent materials.
November, 2021	Caregiver support program staff begin planning to expand the Caregiver Academy from a series of six biweekly programs offered over a three-month period to a year-round education initiative comprised of monthly seminars hosted at senior centers throughout Delaware County, streamed live, and recorded for archiving on social media.
December, 2021	SCS completes design/print of brochures, flyers, and social media collateral. Program staff reviews latest self-assessment data from caregivers.

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January, 2022

Caregiver support program staff work with local healthcare providers, faith-based communities and culturally-specific community organizations to provide information about caregiver support activities and to solicit referrals.

First monthly Caregiver Academy program takes place.

Community Advisory Council begins bimonthly meetings.

February, 2022

SCS seeks support from LINK/ADRC for expanded marketing program to boost and diversity enrollment in the Caregiver Support Program.

March, 2022

Community Advisory Council meets; Caregiver Academy continues.

April, 2022

SCS creates an e-newsletter for caregivers, providing information on how to complete the reimbursement process, news about support groups and the Caregiver Academy, and resources from other agencies that support caregivers.

May, 2022

Caregiver Academy continues monthly programming. Support groups meet regularly.

June, 2022

SCS program staff review data from assessment conducted

Program staff reviews latest self-assessment data from caregivers.

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Project Budget – Caregiver Support Expansion and Inclusion (July 1, 2021 to June 30, 2021)

Revenue

Delaware County Office of Services for the Aging (COSA)	\$	196,600
Federal and State Reimbursements	\$	245,670
Total Revenue	\$	442,270

Expenses

Personnel Expenses

Salaries	\$	125,140
Fringe Benefits	\$	33,550
Sub-total Personnel Expenses	\$	158,690

Federally-funded Reimbursements	\$	167,570
Federally-funded Grandparent Program Reimbursements	\$	35,000
State-funded Reimbursements	\$	43,100
Sub-total - Reimbursements	\$	245,670

Non-personnel Expenses

Occupancy Costs	\$	8,300
Communications	\$	4,000
Supplies/Equipment	\$	6,500
Transportation	\$	1,700
Contract Services	\$	11,000
Miscellaneous	\$	8,000
Caregiver Academy	\$	6,000
Project Management	\$	4,600

Marketing

-- Design	\$	2,500
-- Printing	\$	2,000
-- Advertising and Social Media	\$	7,500
-- Translation Services	\$	1,500

Sub-total Marketing \$ **13,500**

Total Non-personnel Expenses \$ **63,600**

Total Expenses \$ **467,960**

Surplus/(Deficit) \$ **(25,690)**

Pending/Planned Requests

Friends Foundation for the Aging	\$	20,000
PA Link/Aging and Disability Resources Council	\$	6,000

Surplus/(Deficit) after Grants \$ **310**

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Budget Narrative

Revenue

SCS has commitments from COSA and from the federal and state Departments of Aging to fund the operating expenses and the reimbursement to consumers that are the most important element of providing support to family caregivers. Recently-passed legislation raises the caps on monthly reimbursement from \$500 to \$600, increases the lifetime limit on home modifications from \$2,000 to \$5,000, and loosens eligibility criteria. (In the state program, for example, regulations were understood to limit state-funded care receivers to only one dysfunction with an activity of daily living. The new regulations clarify that state funding can go to individuals with at least one dysfunction with an activity of daily living.

Expenses

The two largest expenses associated with the Caregiver Support Program are the reimbursements to participants and the personnel costs associated with running the program. This year, SCS has embarked on a program to raise the salaries of care managers, with dedicated support from COSA attached to that initiative and reflected in this budget.

Non-personnel expenses include a variety of items. While COSA's funding is committed to personnel and the bulk of non-personnel spending, SCS is seeking funding from Friends Foundation and the Link/ADRC to support the marketing and promotion needed to raise the profile of the Caregiver Support Program throughout Delaware County, specifically in marginalized minority communities by partnering with faith communities and other community organizations.