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DRIVEN BY EXCELLENCE.

MEMO

Date: March 4, 2022
To: Friends Foundation for the Aging
From: Friends Services Alliance
Subject: Grant reports for 2021 programs

FSA Leadership Institute

FSA received a grant of \$30,000 late in 2019 for the 2020 program. We did not hold the Institute in 2020 due to the pandemic and the funds were applied to the 2021 program year.

What problem are you addressing?

The purpose of the Institute is to provide leaders with ways of thinking and leading that emanate from, or are consistent with, Quaker values. While the number of Quakers working and living in FSA member organizations is diminishing, FSA believes the values and practices that underpin our approach to leadership and organizational life connect with good human values, and organizations with a values-based culture can result in more satisfied service recipients and staff.

What change did you expect to create? How? What were the desired objectives, outcomes, outputs of the program and progress made toward each during the reporting period?

Objectives -

- Increase self-awareness in participants to support understanding their own leadership capacity and behaviors
- Encourage and support continuing revelation about participant's leadership stance
- Provide tools of engagement for meeting/process design and group interactions that create conditions for collaboration and building community
- Hone skills of listening, asking questions, and reflection
- Builds relationships that nourish the collaborative culture of FSA

Outputs –

- Seven participants were scheduled to go through the Institute. One left her position two weeks before the program began, and one did not return after the first session due to circumstances at his employer. Five participants completed the Institute in 2021. One has since left their position at an FSA member organization.

Desired Outcomes:

- *Reflection*: Increase self-awareness by using reflection to continually evolve a leadership stance and by identifying strengths to leverage and learning edges to explore and develop.
- *Foundations of Trust and Relationship Building*: Hone skills of listening and asking questions in ways that build trust, enhance coaching and building the capacity of others, and contribute to a respectful, generative environment.
- *Building Community and Engaging Stakeholders*: Experience and utilize tools for participatory meeting design, group facilitation, and shared decision making and understand how to use them to create the conditions for collaboration.

Progress:

Below are several comments from 2021 graduates:

- Very informative. Help build up confidence in being a great leader.
- Opens pathway from manager to leader
- Excellent program that allows for a recharge and refresh with new ideas.
- Helps to sharpen leadership skills and gives you new tools to work with
- An insight into Quaker foundations. Can assist in understanding how decisions are made on campus.

How did you measure success – both quantitative and qualitative? A chart of objectives, actions and results is helpful. Include numbers and demographics of people touched by the work. Explain your organization's efforts toward diversity, equity, and inclusion.

See responses to previous question related to objectives, results, and demographics. We do consider the diversity of participants in the program, including ethnically and racially diverse candidates when we can. FSA offers tuition grants to organizations where costs might be a barrier. In 2021 we received one request for tuition assistance and provided a grant for 53% of the tuition.

Please note any collaborations that supported your work and/or ways you leveraged resources. How did the project engage and empower staff from all levels of your organization?

The Institute includes a number of guest speakers to enrich the experience. Debora Sines Pancoe from Friends Council on Education leads the session on Clearness; David Jones, a Quaker and retired VP of Kendal Corporation co-presents the session on collaborative decision-making; former and current executives of FSA member organizations and alumni of the program speak to the cohort. The program is not intended to engage and empower FSA staff, although two members of our staff have gone through the Institute, and a relatively new employee in our Marketing Department came to the session on decision-making this year to gain a better understanding of the process.

Unanticipated Outcomes and barriers encountered. Indicate any changes in the program's goals, strategies, personnel or timelines and the reasons behind the changes.

The only significant was the pandemic and the resulting need to postpone the Institute several times. No significant changes in goals or strategies – we continually modify parts of the curriculum as we see fit, but the goals and objectives stay the same.

How do you plan to share and replicate your results?

We promote the Institute to FSA member organizations on an ongoing basis. We will honor the graduates of the 2021 cohort at our upcoming Annual Meeting. As for replication, we know that we need at least six participants to break even financially (assuming we receive the requested grant). If we have enough applicants, we will launch the 11th year later this spring.

Include a project financial statement (budget and actual) for the reporting period. Please explain significant variances from the original budget and reasons for the variances (with corrective measures if overages) as well as plans for future sustainability.

The grant request in 2019 noted that the cost of the Institute program that finished in March 2019 was \$69,353 and we expected a similar cost for 2020. This cost did not include the approximately \$29,750 in time and materials contributed by FSA.

The actual cost for program year 2021 was \$50,455 due to a smaller cohort. This did not include over \$34,000 in staff time and materials contributed by FSA.

We continue to evaluate the costs of various aspects of the program and the tuition to manage the cost.

Feedback on interaction with FFA would be helpful. How have we helped? Made it harder? What else can we do to facilitate your work?

See note at the end of this report.

FSA Internship Program

What problem are you addressing?

The need for future leaders in aging services.

What change did you expect to create? How? What were the desired objectives, outcomes, outputs of the program and progress made toward each during the reporting period?

The goal of the program is to introduce young adults to the possibilities of careers in aging services. While we have no expectation that every intern will chose to go down that path, we hope to open their minds to future possibilities.

There were six interns in 2021. Three did their internships on-site at the host retirement community and others were remote. All reported positive experiences and that they would recommend this program to others. Here are some comments from intern's final papers:

- I look forward to what the future has in store for me involving senior care and diversity. (Intern with VP of Diversity, Equity, and Inclusion at Broadmead)
- As I look back at the priceless information obtained, I am undoubtedly prepared for a career in long-term care once I completed my degree. (Intern with Director of Health Services, Kendal at Oberlin)
- My goal for future to work in long-term management so it was an amazing to get this experience. (Intern with Director of Human Resources at Friends House, Sandy Spring, MD)

How did you measure success – both quantitative and qualitative? A chart of objectives, actions and results is helpful. Include numbers and demographics of people touched by the work. Explain your organization's efforts toward diversity, equity, and inclusion.

Ultimate success of this program is if an intern ultimately goes into the aging services field. Since the start of the program in 2010, FSA has had 56 interns; of these, eight are still in school. Of the remaining 48 former interns, we were unable to find information on current field of work for 15, leaving 33 former interns for whom we are aware of their profession. Of the 33, eight are working in senior living. Depending what you choose to use as the potential "pool" of senior living professionals, either 17% of all possible (8/48) or 24% (8/33) are working in the senior living field.

In our work to attract a more culturally diverse pool of applicants, we built a connection with the Paul Robeson Center at Penn State. At least one of the interns in 2021 came through this connection.

Please note any collaborations that supported your work and/or ways you leveraged resources. How did the project engage and empower staff from all levels of your organization?

The collaborations that support this work currently are the connections we have built at Penn State. We have formed relationships with people in Health Policy and Administration, Hospitality Management, someone in the Center for Health Aging, and at the Paul Robeson Center.

This year we had an intern for FSA. Her project was to interview previous interns and preceptors, and then develop guidelines and suggestions for future internship projects. She also interviewed several FSA staff members and provided valuable feedback on the program.

Unanticipated Outcomes and barriers encountered. Indicate any changes in the program's goals, strategies, personnel or timelines and the reasons behind the changes.

One of the best outcomes of this program, which was not anticipated, is how these experiences can change the perceptions of the interns about aging and seniors for the better. Many have not had significant experience with seniors for a variety of reasons and have negative perceptions of aging. We hear time and time again how the internship experience helped them to appreciate the rich and interesting lives and experiences that seniors have to share and the importance of supporting ways to help seniors live lives of meaning and dignity, no matter their physical or mental condition.

The pandemic has of course, been a tremendous barrier. While the students who did internships remotely still had good experiences, it was not the same immersive experience that is provided when they live on campus.

How do you plan to share and replicate your results?

We share information about the internship program with our members on an ongoing basis. We have also shared the details and logistics of the program with several other associations.

Include a project financial statement (budget and actual) for the reporting period. Please explain significant variances from the original budget and reasons for the variances (with corrective measures if overages) as well as plans for future sustainability.

In 2021, four of seven internships were done remotely, therefore eliminating travel costs. Total cost for the year was \$6,482 that was split evenly between FFA and FSA. There was a \$3,798 balance remaining from previous grants; when subtracting \$3,241 (50% of 2021 costs) there remains a balance of \$557.

Feedback on interaction with FFA would be helpful. How have we helped? Made it harder? What else can we do to facilitate your work?

This feedback relates to both the grants for the Leadership Institute and Internship Program.

We are extremely grateful for the financial support and neither program would be possible in its current form without it. The FSA Leadership Institute and Internship Program are making a difference – both to FSA member organizations and the field as a whole. The ability to partner with FFA for support for these programs is invaluable. We also appreciate the periodic conversations with the Executive Director of FFA about our programs and process, and her questions at times help to sharpen our thinking.

Suggestions:

Please continue to refine the process for applying for and reporting on grants. There felt like a lot of redundancy between the phone conference with the Executive and Board Chair to review our progress and intentions, and writing the applications for new grants and reports on previous grants.

Please consider multi-year funding. For smaller nonprofits like FSA, single year funding is a challenge when trying to develop work plans, strategic plans, and budgeting.