

Barclay Friends
Final Report to the Friends Foundation for the Aging
Recreation Bus Project
March 2023

1. What problem were you addressing? What solution did you propose to address it?

The old bus we had was too small for the current needs of Barclay Friends, did not have sufficient storage space, and was not wheelchair-accessible. To offer our residents the fun, recreational and social opportunities of regular outings, we needed to upgrade our transportation. The new vehicle purchase will allow our residents to safely enjoy regular social outings to improve their well-being and connection with the outside community.

2. What actions did you take? What worked and didn't work toward your objectives? Please share any unanticipated benefits or barriers encountered.

The most significant variance from our initial project plan was the significant increase in the price of sourcing the bus. When preparing our proposal, we received price quotes in the \$70,000 to \$80,000 range. The chaos that was wrought in the manufacturing supply chain by the COVID lockdowns drove the price of the vehicle much higher to \$108,457.50. The variables that challenged Barclay Friends in this project were entirely outside our control. However, we were committed to this project and willing to round out the needed expense with our own reserve funds.

3. How did you measure success--both quantitative and qualitative? Please include numbers and demographics of people touched by the work.

With our new vehicle, residents can easily and safely travel to scheduled shopping, entertainment, and social excursions. Also important is their ability to initiate and plan more spontaneous outings that provide residents with much greater agency in their lives. Although we did not purchase the bus until November 2022, it has already come in handy over the holidays, with two resident shopping excursions to target and two recreational drives to tour holiday light displays. 29 residents have benefitted from these trips to date. Moreover, the accessibility and storage space on the bus enables us to transport more residents safely on one trip, including those who must travel with a wheelchair. These initial trips were just the start, as the winter is typically a much quieter season for resident excursions. Spring through fall is our busiest time, and we are planning a full roster of activities for residents who will travel on the bus.

4. How did partnerships/collaborations enhance or challenge the project?

We were fortunate to have the McLean Contributionship as a funding partner to supplement the grant from the Friends Foundation for the Aging.

5. Include a budget and actual for the project during the reporting period.

Itemized Budget for Project

Revenue		
	McLean Contributionship Grant	\$35,000
	Friends Foundation for the Aging Grant	\$10,000
	Barclay Friends Reserve Funds	\$63,557
	TOTAL	\$108,457.50
Expense		
	2022 Ford Econoline 14-Passenger Bus	\$108,457.50

The projected budget differed from this only in the additional dollar amount required to purchase the bus, which came from Barclay Friends' reserves.

6. What conversations have you had on how to sustain the project after the grant, and do you have plans to share your results with other organizations?

Once purchased, the routine costs of insurance and upkeep will be included in Barclay Friends' operating budget. Purchasing the bus rather than leasing or contracting for individual trips allows us to keep the bus as an ongoing asset, eliminating annual lease costs and giving us much more flexibility to spontaneously use the bus for outings. As part of the Kendal Corporation's group of senior living communities, we have shared our experiences with the bus purchase with our peers at other communities.

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

Your support throughout the process has been much appreciated and we enjoy our check-ins with the Friends Foundation. We especially appreciate your understanding as the pandemic has affected so many operations and necessitated so many changes over the past few years.

8. Additional comments:

Please see photo on the following page of the 14-passenger bus the Friends Foundation helped us to acquire.

THANK YOU!

