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MEMO

Date: February 27, 2023
To: Friends Foundation for the Aging
From: Friends Services Alliance
Subject: Grant reports for 2022 programs

FSA Leadership Institute

FSA received a grant of \$30,000 late in 2021 for the 2022 program. The Institute was held in-person with three-day sessions in July, September, and November.

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.

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 -

- The program is designed to promote leadership practices that will resonate in organizations that embrace Quaker values. We do our work together in the Institute in the spirit of continuous revelation. This supports the assumption that we are always learning, we can hold our opinions lightly, and we can change our minds.

Outputs –

- Eight participants were scheduled to go through the Institute. One had to back out the week prior to the start of the program due to circumstances at her organization. Seven people completed the program and we look forward to recognizing them at the 2023 FSA Annual Meeting.

Desired Outcomes:

- Reflection

- Foundations of Trust and Relationship Building
- Building Community and Engaging Stakeholders

Progress:

Below are several comments from 2022 graduates:

- The Leadership Institute is a helpful resource for anyone wanting to further their involvement in Quaker organizations.
- Memorable experience – content was amazing!
- Really eye-opening to other things you'd never consider.
- Allows space and tools and guidance to reflect on your leadership style as well as adapt and grow.
- Insightful. Many learnings to guide you to be a successful leader.
- You will learn so much more than you think you will, including about yourself.

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.

The indications of the success of this program come from various sources. There are no metrics, per se, to measure, but below are several things that we believe indicate success:

- Comments and final evaluations from the participants certainly indicate they learn and grow from the experience.
- We get feedback now and then from executives of organizations that have had employees go through the program about the difference it has made.
- Each year we invite two or three alumni from the program to come back and speak at a "Fireside Chat" in the program. No one has ever said no unless for logistical reasons, and some have driven three to four hours each way to do so.
- Perhaps one of the strongest indicators is that several organizations have employees apply every year.

To address any barriers presented by financial resources, FSA offers tuition assistance grants each year. In 2022, one organization applied for and was awarded a grant.

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 CEO and Director of Learning and Development of FSA are faculty in 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.

We had two instances where members of the cohort could not attend in person for a session – one due to COVID, and another due to a non-COVID health issue. We were able to have these individuals connect via Zoom, and while it was not the same as being there in person, they felt they were able to receive the content delivered in those sessions.

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 2022 cohort at our upcoming Annual Meeting. We have already begun to recruit for the 2023 class and know of at least two applicants.

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.

We received a grant of \$30,000 from Friends Foundation for the Aging. The final cost was \$48,918.49. This cost did not include the approximately \$35,000 in 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. We moved to a different location in 2022 which helped to lower the costs a small amount from previous years.

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 three interns in 2022. All did their internships on-site at the host retirement community. All reported positive experiences and that they would recommend this program to others. Here are some comments from intern's final papers:

- The major lessons from my internship are person-centered care and being an advocate for the residents while being respectful and professional.” (Health Care/Activities Intern at Friends House in Maryland)
- I learned I worked well with seniors and in team settings. This realization was important because long-term care often involves communication and cooperation between multiple disciplines. I have had thoughts about becoming a nursing home administrator and would like to explore this career a bit more before committing to it straight out of undergraduate school.” (Compliance Policy Revising and Job Shadowing Internship at Foxdale Village)
- “I really just wanted a meaningful experience that would help me understand my career and educational goals. Kendal at Oberlin really helped me in realizing that the career path I had in mind was the right one to take....I was able to make may connections that allows (sic) me to take a step further towards my goal of wanting to become a future Nursing Home Administrator” (Early Childhood Education Intern at Kendal at Oberlin)

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.

Of the three interns in 2022, two are still in school. The third graduated in December 2022 and is now working in a senior living organization.

It is also worthy of note that one intern from 2022 and one from 2019 applied for the Administrator in Training (AIT) program that FSA is launching in 2023.

In our work to attract a more culturally diverse pool of applicants, we built a connection with the Paul Robeson Center at Penn State in 2022. We are taking additional steps in 2023 to recruit more diverse candidates to the program including posting the internships on a platform called “Handshake” that is used by various schools to post internship opportunities. This includes a number of the HBCU institutions. Our Director of Learning and Development is also reaching out to the United Negro College Fund to promote the internship experiences.

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.

All three interns were connected with LeadingAge's Internship Program for Interns of Color.

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

When the Internship Program was developed, it included a three-way agreement between FSA, the host site, and the academic institution. The agreement was meant to limit the liability for host sites and provide mutual indemnification for all parties. Getting this agreement signed each year for each intern (a requirement of the schools) proved to be a significant challenge, especially in the last five or so years. Different parties from the same school would review the agreement each year and might request changes, there were time delays, etc. Also, when we spoke with some other schools about our program, this agreement was a barrier. We worked with a Human Resources attorney in 2022 to review the requirements of internships and the continued need for this agreement. The academic institutions have their own agreements for internships and the ultimate decision was to utilize those agreements which are between the school and the host site. We then notified FSA member organizations of this change and there was no objection.

FSA's role is now to gather internship opportunities from member organizations, advertise and promote internships, recruit and interview potential interns, perform reference checks for final candidates, match with internship, and connect the student with host site. We also provide some content at times through our Learning Labs, and interns submit a final "Integrating Paper" about their experience to FSA.

How do you plan to share and replicate your results?

We share information about the internship program with our members on an ongoing basis. The application window for the 2023 internship opportunities is now open.

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.

We received a grant of \$5,000 in late 2021 for the 2022 program. Costs for the Internship Program are shared equally between Friends Foundation for the Aging and FSA. The final cost for the three interns in 2022 was \$4,057.20. This included stipends and travel costs. Split equally, this means that \$2,028.60 of the grant was used for the program. We respectfully request that we retain the balance to apply to the 2023 program year.

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.

The only request is one that was made before – to consider multi-year funding. For small organizations such as FSA, with demonstrated positive results from the programs that have received regular funding from the Foundation, the time needed to write reports and applications each year might be better spent elsewhere.