



ROOTED IN VALUES.
DRIVEN BY EXCELLENCE.

MEMO

Date: February 8, 2024
To: Friends Foundation for the Aging
From: Friends Services Alliance
Subject: Grant reports for 2023 programs

FSA Leadership Institute

FSA received a grant of \$20,000 in April 2023 for the Leadership Institute. The Institute was held in-person with three-day sessions in July, September, and November.

What problem are you addressing?

The number of Quakers leading and living in organizations is decreasing. The purpose of this 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. Hopefully this supports preserving the culture and practices in these organizations. 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 –

- Nine participants from nine different organizations went through the program in 2023. Their positions included an Interim CEO of a member organization, two department leaders from Maintenance, Director of Home

Health, Director of Housekeeping, an Assistant to the CEO/Office Manager, and the newly hired Learning & Development Associate at FSA.

Desired Outcomes:

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

Progress:

Below are several comments from 2023 graduates:

- Content and work between sessions was presented in a way that encouraged growth.
- All of the content on Listening and Engagement was great.
- Thought provoking and challenging.
- In regard to previous alumni as guest speakers – We heard how what we are learning can be operationalized
- Like the presentation on Clerking/Collaborative Decision-Making

One of the graduates will speak at the 2024 FSA Annual Meeting to share his experience at the Institute.

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:

- Six of the eight organizations sending participants this year (not including FSA) have sent at least one person to the Institute every year.
- Comments and final evaluations from the participants certainly indicate they learn and grow from the experience.
- There is an organization that is not a member of FSA, whose CEO and Director of Human Resources used to be at two different member organizations that sent people to the Institute. This organization engages with FSA in several ways such as Compliance, DEIB work, Mission/Vision/Values work, and may send someone to the Institute in 2024 because of their high regard for the program.
- 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. Hearing them talk about the ways they have applied their learning and how they have grown is a demonstration of the difference this program made in their journeys.

To address any barriers presented by financial resources, FSA offers tuition assistance grants each year. In 2023, two organizations applied for and were awarded grants totaling \$5,150.

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, retired VP of Kendal Corporation, and now a member of the FSA Board 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.

None, thankfully, in 2023.

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 2023 cohort at our upcoming Annual Meeting and are about to open the application window for the 2024 class.

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.

Income:

	<u>Budget: \$60,000</u>	<u>Actual</u>	<u>Variance</u>
FFA Grant	\$30,000	\$20,000	FFA decision
Tuition*	\$30,000 (incl asst. grants)	\$24,850 (see next line)	
Asst. Grants		<u>\$ 5,150</u>	
TOTAL		\$50,000	smaller grant

*This includes FSA funds to pay for an FSA employee going through the program.

Expense:

<u>Budget: \$60,000</u>	<u>Actual \$56,746.11</u>
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Expenses were higher than previous years due to an increased number of participants; they fell within budget but were more than the associated Income. The gap was absorbed by FSA Operating Funds.

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. We have not increased tuition in several years despite rising costs. We will be raising the tuition by \$250 per participant and making some additional changes for 2024 to bring expenses down, hopefully by about \$5,000.

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 choose to go down that path, we hope to open their minds to future possibilities.

There were seven interns in 2023. All did their internships on-site at the host retirement community. An eighth student had accepted an intern position for the Fall semester but was unable to complete it. The seven who did, reported positive experiences and that they would recommend this program to others. Here are some comments from intern's final papers:

- I had worked at a nursing home, and I loved my time with the residents and seeing how my positive behavior and interactions impacted them. That is also why I jumped on this internship so quickly because I couldn't let the opportunity go. And though I had a previous experience, Kendal at Oberlin is

an entirely different form of retirement living, and I loved seeing and witnessing the difference between the residence and staff. I can only hope one day to find a place like Kendal to work or be able to bring what I have learned from Kendal to another facility and show the positives that come from this way of approaching aging.

- My internship at Friends House was extremely positive and only strengthened my desire to work in healthcare. As a compassionate person, the care and love that all the employees had for the residents, and vice versa, was very evident and heartwarming. These observations led me to believe that I would be a good fit in the healthcare and human resources sectors. Additionally, spending time with the various departments of the organization opened my eyes to the vast career opportunities that are present in healthcare.
- Moreover, having the ability to connect with residents and learning alongside of them has been very beneficial in light of my academic goals. In academia, I pride myself on always being the student' because there's consistently new things to learn and build upon as we evolve in this digital era. Coming onboard as an IT intern was not solely about me teaching the residents how to use technology, rather learning from them how technology can better assist them and instruct around them – using a user centered design approach.

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.

It is hard to quantify the success of this program. Participants report positive experiences and some go on to work in the senior living field. We last worked to quantify the number of previous interns working in the field in 2019/2020 and will be doing so again in the next few months.

In 2023 we used the electronic platform “Handshake” to list our internships and targeted HCBUs. Unfortunately the response rate was poor. We did have interns from six schools in 2023.

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?

In 2023, we worked with the organizations submitting internship proposals to reach out to academic institutions in their region and/or with who they had previous connections for students and interns. This was a great strategy for placing interns from a variety of schools. We also continue with our relationship with Penn State 's School of Hospitality Management, and Health Policy and Administration Program.

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

As noted above, we expanded our strategy to recruit interns from a wider variety of schools.

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 2024 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.

The final cost of the program for 2023 was \$7,000, split equally between FFA and FSA. We held a balance of \$3,528 from the previous years grants from FFA; \$3,500 was applied toward program costs, leaving a balance of \$28. We respectfully request to hold this for the 2024 program.

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.

Our partnership with FFA for both of these programs is invaluable. One of FSA's strategic priorities is to support the development of future leaders and we are extremely grateful for the financial support. Without these grants, both the Leadership Institute and Internship Program would have to be scaled down considerably. The periodic conversations with the FFA Executive about our programs and process, and her questions encourage us to always be thinking about what we are doing – what works, and what might be done differently.

The only request is one that was made before – to consider multi-year funding. For small organizations such as FSA, that do not have development/fundraising staff, and have a strong track record of success in the funded programs, the time needed to write reports and applications each year might be better spent elsewhere.