

## ED Report 2.25

Before getting into the details of my usual report, I want to acknowledge that there are several rapidly emerging national issues of concern to the non-profit and philanthropic world. Top among them are the campaign against DEI that we have worked so hard to promote, and the cancellation of federal funds for many organizations that address human needs, subsequently paused by a judge. Several Quaker organizations have filed a suit against Homeland Security challenging the decision that disallows church and schools to be considered safe spaces for immigrants. I am attending programs to stay informed such as one by Funders for Justice on Feb 6. We may need to be prepared to give some emergency funding to some of our partners. I plan to ask our grantee partners about the impact on funding and DEI during midyear conversations.

PLEASE LET ME KNOW IF YOU WANT ME TO REGISTER YOU FOR THE **FSA ANNUAL MEETING AT MEDFORD LEAS ON MARCH 12 AND 13**. I will be attending. The speaker is on AI in aging services. They will also present the leadership program graduates and talk about the merger with MHS, and there is a farewell party for Jane on the 12<sup>th</sup>.

**Administrative:** completed 990 and Annual Financial Report, submitted. Wrote annual self-evaluation. Eric, Jim, Tyler and I met with Marylee and Soena to discuss the transition of accountants and I worked with Tyler on the Quickbooks account. The conversion to QB online and transition to Soena presented challenges in producing the Q4 financials, but they are done. I have made progress on finding a bookkeeper to do the JPM quarterly statement worksheets, connecting with an accountant who was on my PSRC board. I signed the updated agreement with Friends Fiduciary. I have started preparation for the 2024 audit.

I attended the Hub for Aging Collaborative (Rutgers U) Equity in Community Centered Models for Aging program. It highlighted research and practical efforts to increase equity in aging programs across the globe. These included intentional outreach to diverse groups in the community, holding events that focused on these groups, embracing diversity, attending to accessibility, and translation of materials.

I attended the Supportive Housing Association of NJ presentation on their new guide to building supportive housing across the state, and their monthly meeting which is focusing on advocacy with State government, and continue to attend the ALP Coalition meetings.

I attended the ribbon cutting for the new art rooms at Friends House Retirement (MD) and explored next steps with Patti Nesbitt (BYM). I will also do a program for Friends LifeCare at Home. and maybe at Friends Village.

I have sent interesting articles and resources to the board and grantee partners. I connected Kevin at ARCH with Donna at Adirondack Mercy Care.

The Sarah Ralston Foundation has selected Heather Finnegan as the next CEO. We will meet in March. Ben Hoyle is the board president. They used Bridge Partners for the search. More information about her and their recent innovation grant partners are on their website. [sarahralstonfoundation.org](http://sarahralstonfoundation.org) I am pleased to see how many of our Philadelphia grantee partners are now being supported by Ralston.

I attended the CNJG annual meeting on December 11. The program was thought-provoking, reintroducing the NJ Principles for Philanthropy (see below) and doing a deeper dive into equity and

leadership. The presenters asked us how often we ask about grantee partners succession plans, concerns and efforts toward greater equity in those they serve, and for feedback on what we aren't seeing. It also made me think about their strategic plans. I think we might benefit from exploring the principles together.

Marsha Wesley Coleman left FSA at the end of 2024; she will not be replaced due to the merger. FSA plans to continue the Leadership and Internship programs but not sure in what form. FSA will include a session on AI instead of a CEO meeting at the annual meeting. A later CEO meeting will be held for those in residential communities. I think we should watch where the organization goes with the MHS merger and how it relates to FFA mission and objectives.

CNJG CEO meeting talked about responding to Federal Policy changes. They are planning a workshop series in the spring. The annual conference will focus on civic engagement in a range of sectors. Periodically they offer a lobbying vs advocacy program; need more board attendance. The Stand for Your Mission toolkit was recommended. Discussion on balance of multi-year grants and having space for new proposals.

The Chronicle of Philanthropy reports the finding of the Census Bureau and Americorp that volunteering—for nonprofits or informally-- has rebounded since the pandemic, to 28.3% of the population (75.8 million). The value of a volunteer hour is \$33.49.

I read an interesting opinion piece about why philanthropy will never work, which basically says that the population in need grows faster than the resources to address the problems, and that this will be even worse if government resources are withdrawn.

(<https://www.nytimes.com/2025/02/03/opinion/philanthropy-charity-billionaires-math.html>) My thoughts went to our conversations about wanting to have impact, which in my thinking translates to seeking projects that propose a new solution rather than maintaining existing programs, although this may mean not funding programs that work.

#### **Applicants turned away:**

- Por Thom Elderly Association- seemed like phishing, misspellings, no address, no company email, foreign phone...clearly hadn't read our website.  
<https://www.nytimes.com/2025/02/03/opinion/philanthropy-charity-billionaires-math.html>
- Climate Justice Fund- *The initiative aims to support community-based organizations in advocating for their needs, with a focus on establishing a community advisory committee to finalize the fund's criteria and ensure effective resource allocation.* Not seeking funding as much as connections in Bucks Co. Gave some names.
- Newark Housing authority- computers in senior housing. Not a non-profit, may use tenant association 501c3. Referred to Senior Planet and other Newark funders.
- Montco SAAC- want general operations or capital, may come back with program idea
- New Community – elder abuse training for Home Friends staff- large organization in Newark, have Essex Co grant for this program that should include training. Should coordinate with other local providers or see if free training from AARP or APS.
- Adirondack Mercy Care – volunteer home visitor program. Waiting until after February meeting – is it in our catchment area?
- Jewish Federations – sponsor workshop on aging + trauma- Nationwide, don't do sponsorships

### Conversations with potential new applicants:

- Union Settlement – very large NYC settlement house based senior services. Want to subscribe to a software (Blooming Health) to stay in touch with participants. Worthy organization but large and in NYC.
- Starve Poverty- Barnegat Twp NJ, home modifications to keep low income people in homes, faith-based. Not sure I see anything novel here.
- Family & Children’s Service Monmouth- In home activity program for home-based clients using hourly companion staff.
- Twilight Wish- fulfilling senior wishes, NJ chapter
- Farmington-Scipio Regional Meeting – no info on plan yet, just question from treasurer about being fiscal agent

### Grantee updates

- Pendle Hill and QVS are both enthusiastic about the things Lucas has been able to do, including a newsletter for Quaker Convening participants and resource guide for aging adults, outreach to meetings and retirement communities, and laying the groundwork for making audiobooks and study guides of Pendle Hill pamphlets as well as digitizing them. Should QVS seek other senior direct service opportunities? Would FFA fund another PH fellow to implement the audiobook project? Is funding QVS too many steps away from direct impact on aging adults? Should Pendle Hill consider a staff person of its own to continue the work?

Some of you suggested that it would be helpful to understand what issues other funders or aging service providers are focusing on. I think these are the best responses. How do you want to use them?

#### 1. NJ PRINCIPLES FOR PHILANTHROPY <https://www.cnjg.org/principles-philanthropy>

The Council of NJ Grantmakers created this guide for members, significantly influenced by Trust Based Philanthropy. “Each principle begins with a common understanding followed by developmental steps for members beginning to look at these principles as well as the aspiration for each principle. These principles are intended to promote continuous learning, vulnerability, and reflection for how philanthropy can evolve from its historical roots to a more trusting, accountable, and equitable model.”

FFA can use these principles to guide our efforts toward right relationships with our grantee partners and the communities we serve. How can we be our best values-based grant makers?

The principles include:

1. Ethical Leadership- we must be ethical in our governance, decision-making and organizational culture to gain the trust of the communities we work in. We aspire to engage the community and increase diversity in these practices.
2. Stewardship- we use assets to create positive benefits and impact in our communities. We employ values-based investing, impact investing and giving beyond minimum requirements to benefit community.
3. Values- we have clear and transparent goals, missions and values to facilitate accountability. We engage community in review and revision of these values.
4. Equity & Justice- Philanthropy is created to promote the welfare of others. We commit to dismantling disparities in access to power, money and resources. At the same time philanthropy is built on historic

structural inequities and systemic racism. These result in a resource gap and power differential between philanthropy and the community. We seek to understand the impact of these inequities and learn from our grantee partners, toward shared power and increased trust.

5. Community Engagement- We build long-term relationships rather than short-term transactions. We listen to the community in a respectful manner, listening and learning, with curiosity and humility. We align our expectations with their resources. We solicit feedback.

6. Public Voice- Our public voice augments our grantmaking toward our goals. We listen to those with lived experience and amplify their voice, educate ourselves and others, share knowledge, impact change. We support grassroots organizing and advocacy.

7. Continuous Learning- We are curious about our work and learn from many sources to improve our grantmaking, learning together with our grantee partners.

8. Transparency & Accountability- transparency builds accountability to our mission, values and goals. We grow and change from feedback and critique.

## **2. NJ STATEWIDE SURVEY OF OLDER ADULTS**

NJAAW conducted a statewide survey of older adults 60+ in the spring of 2024 to learn their concerns, challenges and plans for aging in NJ. Many of the surveys were distributed through NJAAW members, senior centers, meal programs and county offices on aging (no skilled nursing). Top concerns were (in order) health, housing, finances, participating in favorite activities, transportation, family and food/nutrition. Problems identified include lack of awareness of available resources, as well as property taxes and cost of living, lack of housing options, need for more supports and services and opportunities for social connection. Nearly half expect to stay in their current homes. Less than half receive a pension and 25% are still working. Home upkeep topped the list of financial challenges. Many are aware of senior programs but do not participate. Over half do not have a plan for long-term care.

The New Jersey Division of Aging Services also has a Strategic Plan for Aging 2022-25, as required by the Administration on Aging Older Americans Act. It is a 111 page document of data and descriptions of all programs in the state related to aging. Goals include:

- Improve access to services for New Jersey's diverse older adult and caregiver populations through simplified application processes and a coordinated outreach effort aimed at both consumers and public and private service providers
- Enable older adults to remain living in their homes through the availability of a broad array of high-quality home and community based services.
- The Division of Aging Services, via the work of the Age-Friendly Advisory Council will promote age-friendly best practices across the state.
- Empower caregivers to continue in their role by identifying the areas in which support and services are needed, and by assisting them with obtaining those necessary supports and services.
- Emergency Preparedness: Enhance ability of older adults, caregivers and the aging services network to effectively deal with local, state, national and global emergencies.
- Ensure the rights of older adults and prevent abuse, neglect and exploitation.
- Implement quality improvement activities that promote program integrity strengthen business processes and improve the division's efficiency and accountability.

3. Similarly, PA has a 10 year plan, entitled **AGING OUR WAY PA** (only 60 pages!)

Priorities are:

- Unlocking access- offer equitable, affordable, and available options and opportunities
- Aging in community- remove barriers that prevent people from remaining in their homes and communities.
- Gateways to independence- promote unhindered mobility by designing transportation systems that allow older adults' safe, convenient, and autonomous use of transportation services.
- Caregiver supports-build a comprehensive catalogue of supports and enhancements that provide caregivers with help at home, respite, training, and navigation tools.
- Education and navigation-lead a coordinated network of partners to raise public awareness of services for older adults, provide information that reaches everyone and is understandable by all, ensure timely and streamlined connection to assistance with any need, and resolve the challenging problems that older adults face in their daily lives.

It strikes me that NJ is more government-focused and PA relies on individuals and families. It may be useful to look for the issues that are not on the radar of the state department on aging, or to think of ways that FFA can support the non-profits who are trying to achieve these goals.

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