

Dr. Lynn Goodperson Ph.D.
Executive Director
xyz Foundation
1234 Main Street
Anytown, XY 99999

Dear Dr. Goodperson:

The Meals Consortium is submitting this proposal to the xyz Foundation for a \$30,000 grant to implement a new social services referral program. This new program will enable frail Seniors to obtain important social services to help them remain in their own home.

The Board of Directors of the consortium believes the social services referral program will provide the 700 people we serve with important services to help them maintain their independence and dignity. They sincerely hope you will respond favorably to our request for funds.

Our Executive Director, Ms. Theresa White, will contact you in the next two weeks to see if you have any questions about our proposal.

Thank you for your consideration.

Sincerely,

Susan Grantswriter
President
Board of Directors

MEALS CONSORTIUM SOCIAL SERVICES REFERRAL PROJECT

PROPOSAL TO THE XYZ FOUNDATION

Proposal Summary

The Meals Consortium is a consortium of Meals on Wheels programs serving frail older adults in xxx County. The mission of the Meals Consortium is to deliver a coordinated system of home delivered meals to meet the nutritional needs of homebound Seniors.

Recognizing that the target population of homebound older adults needs more than just a hot meal and friendly visit each day, the Meals Consortium is proposing to begin a Social Services Referral Program with skilled social workers assessing the non-nutritional needs of the individuals served and making appropriate referrals. The purpose of this new program is to ensure homebound older adults receive the services they need to maintain their independence and remain in their own home.

Costly institutionalization is about the only alternative to living at home for most of the individuals served by Meals Consortium members. Few individuals have a desire to move to a convalescent home and will struggle to maintain their independence and dignity in their home. With appropriate social services referrals in addition to a good nutritionally sound diet, frail older adults have a better chance of remaining in their home environment.

The Social Services Referral Program has three objectives: 1) to increase social services referrals and follow-up for individuals served by the Meals Consortium; 2) to increase social services direct care for the most vulnerable older adults served by the Meals Consortium; and 3) to reduce the number of individuals being institutionalized.

Meals Consortium members have served the target population for many years providing frail older adults with nutritional meals. By forming a consortium six years ago, the Meals on Wheels programs have increased their cost-effectiveness and efficiency. The Social Services Referral program is another step in the consortium's efforts to help individuals maintain their independence.

First year program costs are expected to be \$173,700. This proposal is for \$30,000. Remaining funds for the new program will come from a grant from the Area Agency on Aging, from other foundation sources and from the Meals Consortium annual event.

MEALS CONSORTIUM PROPOSAL TO THE XYZ FOUNDATION

Introduction

The Meals Consortium was formed six years ago as a 501 (c) (3) nonprofit, creating a consortium of the five meals-on-wheels programs in this County. The intent of this cooperative venture of the five agencies is to establish a more coordinated system of meeting the nutritional needs of frail older individuals in the county.

The five agencies which form the consortium are: City Meals on Wheels, Older Adults Services, Seniors Ending Hunger, Valley Meals on Wheels, and the Hunger Program for Seniors. The County Area Agency on Aging provides office and meeting space, telephone, photocopying and mailing services, and limited administrative support.

The Meals Consortium was created to avoid duplication of effort and maximize the effective use of scarce resources among the five major Meals on Wheels programs in this County. The consortium model has resulted in significant cost savings for participating organizations. One example of these savings is that the smaller agencies do not need to pay the high costs of hiring a fundraising staff person who would be necessary to ensure their program growth. Instead, these organizations rely on the Meals Consortium fundraising efforts to assist their programs. There are also considerable cost savings realized through group purchases of items which all the programs use.

The board of directors of the Meals Consortium is comprised primarily of Meals on Wheels program directors, staff members of the County Area Agency on Aging, and interested community members. The current board Past-President is a former consumer of Meals on Wheels and is an active community volunteer. The board meets monthly to review individual organizational efforts and discuss ways of coordinating limited resources to effectively serve their populations.

Two part-time staff manage the fundraising efforts of the Meals Consortium. Administrative support is donated by the County Area Agency on Aging.

The operating budget of the consortium is small to ensure that funds raised go to the five consortium members' Meals on Wheels programs. Finances are managed by the board Treasurer, currently a staff person from the County Area Agency on Aging. Overhead expenses are minimal because the County Area Agency on Aging provides office space and equipment, mailing services at no cost to the program. The fiscal agent for the consortium is the County government. (Please see attached detailed budget for more financial information.)

The effectiveness of the Meals Consortium has resulted in considerable interest from other counties who have more than one Meals on Wheels program. Information is shared and presentations are given to help other groups interested in joining together.

Introduction (Continued)

The Meals Consortium agencies serve more than 700 frail elders each day, providing them with hot meals and a friendly visit from a volunteer. In 1993, the consortium members served 255,000 meals to more than 1,000 different elderly men and women. Nearly 2/3 of the meals went to persons 75 years of age or older. Half had incomes under \$600 a month. Nearly 6 out of 10 lived alone. Minorities made up 37% of the total number of individuals served.

In addition to providing hot home-delivered meals to seniors, the consortium members' volunteers who deliver the daily meals provide friendly visits to the sometimes isolated older individuals. These volunteers are an important link to the outside world for the homebound elderly.

By providing home-delivered meals and a friendly visit, the consortium organizations are working to help older individuals retain their independence and live out their lives with dignity in their own homes.

Statement of Need

Within this county there are a growing number of social services available for the rapidly expanding population of elderly individuals. Seniors can have errands run for them through the Errand Service, obtain door-to-door transportation to doctors' appointments, receive a daily phone call as a check-up, obtain legal or financial planning assistance, and have someone make safety repairs on their homes.

Unfortunately, as services for seniors are flourishing, a homebound person's ability to access these services is diminishing because of the loss of county funding for social workers. There has been a 25% reduction in social workers in this county in the past two years. Each remaining social worker has a minimum caseload of 150 individuals which makes regular home visits virtually impossible. Additionally, there are no longer any social workers who specialize in gerontology thereby reducing their effectiveness with the homebound elderly.

None of the 700 frail individuals receiving daily nutritious meals have a regular social worker to determine appropriate social services to help them stay in their home. The result is that an older person's daily nutrition needs are being met by our programs, but equally important social service needs are not. Without a coordinated system which assists the health and social service needs of this population, the risk of being institutionalized is high.

As an example, Mrs. X has been receiving Meals on Wheels for three years. She is 82 years old and is unable to walk for more than a few steps due to severe Arthritis. She has other medical problems as well. Her family lives in another state and only visit during the holidays. Mrs. X receives her daily meal from Meals on Wheels but she relies on the goodwill of her neighbors to pick up some

Statement of Need (Continued)

groceries for her and to take her to the doctor. The neighbors are not always available to help her and Mrs. X has missed important appointments and gone hungry because she is homebound. Mrs. X was not aware of the Errand Program for homebound older adults or the Transportation Service until a Meals on Wheels volunteer mentioned them to her. If social workers had been available to assess Mrs. X's needs and make referrals, she would have received the help she requires quicker.

This example is representative of the difficulties faced by many homebound individuals, and the frustrations faced by staff who want to help frail elders stay in their homes. Social workers focused on the needs of this population and making appropriate referrals and follow-up would make a valuable difference in the quality of life of all persons served.

The solution of coordinating nutrition and social services to the homebound elderly is crucial. A recent report from the county's Department on Aging indicated that intervention with comprehensive dietary and social services will prolong an older person's ability to stay at home, thus giving them the independence they seek, and helping hold down the high costs of institutionalization.

The member organizations of the Meals Consortium have been providing quality nutrition services to frail older individuals for many years. No other organization in the County provides direct services to this special population, making the Meals Consortium the most likely nonprofit to fill this important gap in services. The addition of a Social Services Referral program, coordinated by the Consortium, is seen as a cost-effective addition to providing more comprehensive care to the homebound.

Goals and Objectives

The primary goal of the Meal Consortium is to enable homebound frail elders to live with independence and dignity in their own homes. Without the daily nutritional meals, the homebound would risk malnourishment and deteriorating health since they are unable to prepare their own meals. The alternative for most of the individuals served is costly institutionalization. A secondary goal of the Meal Consortium is to prevent the cost burden of institutionalization for the homebound and for the community.

The project being proposed will help meet the Consortium's goals. The following objectives are specific to the proposed social services referral program.

Objectives:

- 1) Increase social services referrals and follow-up for 75% of the individuals served by the Meals Consortium during 1994-95.
- 2) Increase social services direct care to 90% of the most vulnerable homebound elders served by the Meals Consortium.
- 3) Reduce by 10% the number of individuals leaving the Meals Consortium to be institutionalized due to lack of social services.

Methods

To accomplish the objectives stated in the previous section, the Meals Consortium will use the following methods. It was decided to follow this course of action because of the success of model social services/nutrition programs which were developed using these same strategies. A timeline is in the appendices which gives expected start/finish dates for each activity.

Objective #1 Increase social services referrals and follow-up for 75% of the individuals served by the Meals Consortium.

Methods

- Consortium members will hire a Social Services Program Coordinator within the first two months of the program.
- The Program Coordinator will hire two additional social workers within the first four months of the program.
- Consortium members will ensure office equipment and supplies are available for the Coordinator, social workers and support staff within the first four months of the program.
- The Program Coordinator and social workers will work with Consortium members to identify those most in need of social services and begin referrals and follow-up within the first three months of the program.
- The Program Coordinator will hire any support staff within the first four months of the program.
- The Program Coordinator and social workers will fully implement the plan before the six month of the new program.

(The other two objectives from the Goals and Objective Section would be identified with Methods following them exactly as the first objective indicates.)

Evaluation

At every four month interval, the Program Coordinator will measure the new Social Services Referral Program progress towards meeting the three objectives identified in the Goals and Objectives Section of this proposal. Data will be collected daily by the social workers and support staff on each of the individuals needing social services referrals. This data will indicate what referral was made, the reason for the referral and what a one-week follow-up phone call after the referral indicated. Individuals at greatest risk for institutionalization will receive additional follow-up calls and personal visits by the social workers to ensure that the services needed are being provided. The number of individuals leaving a Meals on Wheels program will be tracked monthly to show how many were institutionalized and why. Each funder of the Social Services Referral Program will receive quarterly reports during the first year of the project. In addition, Board members, the Executive Director and other interested individuals will receive the reports.

Future Funding

The Meals Consortium has a strong history of obtaining on-going funding for Meals on Wheels Programs. The Social Services Referral program is expected to have the support of foundations interested in start-up projects for the first two years. In addition to these monies, the Development Director will increase the amount of unrestricted funds for the consortium through direct mail and the annual special event. During 1993, the growth rate of the individual donor base was 20% and the special event doubled its net income. Efforts are being made to continue this growth in order to use unrestricted funds for the new program.

Meals Consortium Social Services Referral Program Budget

EXPECTED REVENUE

	Cash Required	In-Kind Donation Total
Grants		
Foundations	\$ 45,000	
Government Agencies	\$ 30,000	
Corporations	\$ 15,000	
Contributions		
Individual Unrestricted	\$ 27,000	
Individual Restricted	\$ 20,000	
Special Events	\$ 15,000	
Donations In-Kind		\$ 22,000
TOTAL REVENUE		\$174,000

EXPECTED EXPENSES

Personnel

Salaries

Program Coordinator	\$21,600	
Social Worker I	\$14,400	
Social Worker II	\$14,400	
Administrative Asst.	\$ 8,100	
Executive Director (15%)	\$ 7,200	
Benefits (20%)	\$13,100	

Non-Salary

Contract Personnel	\$27,000	\$ 5,000
Intake Workers		\$ 9,000
TOTAL PERSONNEL	\$105,800	\$14,000

Non-Personnel

Rent	\$ 7,200	
Insurance	\$ 1,500	
Printing	\$ 7,500	\$ 3,000
Equipment	\$10,000	\$ 5,000
Office Supplies	\$ 4,000	
Utilities	\$ 1,000	
Telephone	\$ 1,000	
Copy Services	\$ 2,000	
Postage	\$ 9,000	
Travel	\$ 1,800	
Membership Dues	\$ 500	
TOTAL NON-PERSONNEL	\$45,500	\$ 8,000

TOTAL EXPENSES

\$173,700