Chester County
Historic Preservation Network

Spring Workshop
Brandywine River Museum
Saturday, March 14, 2009

FUNDRAISING ESSENTIALS
LEARNING GOALS:

• to understand key fundraising strategies, tactics, relationships, and resources required to be successful
• to develop a brief ‘elevator speech’ to introduce your initiative to prospective donors
• to better understand how to work with conference & visitor’s bureaus to help market and fund your initiatives
• to better understand how to access government funds
• to improve your knowledge of grant proposal writing
• to provide specific resources to research prospective foundation funders

The Chester County Historic Preservation Network (CCHPN) is an affiliation of local organizations and individuals dedicated to promoting, protecting, and preserving Chester County's historic resources and landscapes through education, facilitation, and public and private advocacy. As a 501(c)3 nonprofit organization, all donations are tax-deductible.
Spring 2009 Workshop Agenda

8:30a  Meet & Greet/Coffee, Juice, and Pastries

9:00  Welcome
Robert J. Wise, Chair, Chester County Historic Preservation Network
John Theilacker, Associate Director, Municipal Assistance Program, Brandywine Conservancy

9:05  Panel: Obtaining Historic Preservation Funds via Government Resources
The Honorable Andrew Dinniman, PA State Senator
The Honorable Barbara McIlvaine Smith, PA State Representative
The Honorable Duane Milne, PA State Representative
The Honorable Paul J. Drucker, PA State Representative

10:15  Break

10:30  Fundraising Planning Process
Karen Simmons, President/CEO, Chester County Community Foundation
A. Where are we going?
B. Why do we need the money?
C. Why do people give?
D. Who should we approach?
E. How long will it take to raise funds?
F. What are giving options?
G. The most successful fundraising

10:45  Fundraising: The Importance of Cultivation, Networking, Events & Members
Rob Lukens, Director, Historic Yellow Springs, Inc.

12:15p  Break to Get Lunches

12:30  Lunch - Optional Table Talks  Led by presenters - choose your topic and join the table

1:15  What the Chester County Conference & Visitors Bureau Can Do For You
Nina Kelly, Director of Communications

1:35  Break

1:45  Grants
Connie Carter & Corrine Sylvia, PA Foundations OnLine
A. Researching Foundations & Corporate Foundations
B. Grant Proposal Writing Basics/Tips

3:10  Closing Comments
Matthew E. Roberson, CCHPN

3:15  Depart
U.S. CHARITABLE GIVING . . . $306.39 billion in 2007

WHERE IT COMES FROM

WHERE IT GOES
1) Strategic planning for the organization & project

2) Agree it's time to fundraise, more

3) Assist in developing and approving the fundraising case statement

4) Assisting in developing and approving the fundraising plan
   A. Donor motivation: Why do people give?
   B. Average time needed to make a profit: How long will it take?
   C. Diversified funding mix: What giving options are available?

5) Targeting groups of donors, and approaching some of them

6) Evaluating what worked and what didn't; and why.
A. WHERE ARE WE GOING? STRATEGIC PLANNING PROCESS

i. ARE WE READY?

i. Issues which should be discussed/resolved to set the conditions for strategic planning
ii. Organizational ability to commit resources to planning

Planning Phase I: WHERE ARE WE NOW?

A. Mission - general agreement on overall organizational purpose
   input from board, staff, constituents, funders

B. Ideal design: values, key operating principles, market positioning, key success indicators - what do we want to be like in 2-5-10 years?
   input from board, staff, constituents

C. Critical issues
   1. External trends: opportunities and threats
   2. Collaborative/competitive scan of options
   3. Internal review: strengths and weaknesses; positioning; capabilities
      a. Programs and services
      b. Management and administration
      c. Governance
         general input from board, staff, funders, constituents
         more detailed input from market research

Planning Phase II: WHERE CAN WE BE?

A. Decide overall strategic direction of organization; overarching initiative(s); key success indicators; revise organizational mission/purpose if necessary
   board decision, with staff input

Planning Phase III: HOW ARE WE GOING TO GET THERE?

A. Delineate goals, objectives, strategies, tactics and action steps by program area
   mostly staff, with board committees

Planning Phase IV: LET'S DO IT, CHECK IT, AND CHANGE IT AS NEEDED

A. Implement: Do, and evaluate progress at checkpoints; revise as necessary
   as assigned
B. WHY DO WE NEED THE MONEY? THE CASE STATEMENT

Elevator Speech, Cocktail Reception Chat…

- The reason you want to raise money for a need/problem
  - "Selling points" which convey
    the importance, relevance and urgency of the initiative

WHAT?

- What is the need that you are meeting?
- Who is affected?

SO WHAT?

- What happens to people because of this problem/need?
- Why is it important that you meet that need? What will it do for the world?

NOW WHAT?

- How do you go about meeting this need? What solutions do you offer?
- What difference will the solution make?
- Why are you the unique organization that should do this?
- What will it cost? What else will you need?

WIIFM?

- What's in it for me, the donor?

PROJECT:
1-TAKE A FEW MOMENTS TO JOT NOTES ABOUT YOUR CURRENT HISTORIC PRESERVATION INITIATIVE.
2-WHAT’S YOUR 3 SENTENCE SUMMARY?
3-TEST IT OUT ON THE PERSON NEXT TO YOU AT THE TABLE.
C. WHY DO PEOPLE GIVE? DONOR MOTIVATION

Imagine that an acquaintance of yours has come to you, explained a cause they are involved in, and ask for a gift. Imagine that the gift is an affordable amount, but not an amount one could give to everybody who asked. (For most people, this amount is somewhere between $50 and $500.)

Why “Yes”?  Why “No”?___________________

LEVELS OF COMMITMENT

OWNERSHIP-purchase
estate gifts, bequests, charitable gift annuities

COMMITTED-insistence
major gifts

INVOLVED-preference
repeat annual gifts, special purpose gifts, Board service

PARTICIPATE-liking
Memberships, annual gifts, volunteer

INTERESTED-knowledge
Special event, newsletter reader, single contribution

PREDISPOSED-awareness
Newspaper articles, listings
D. WHO SHOULD WE APPROACH? TARGETING DONOR GROUPS

LEAST LIKELY TO GIVE

MOST LIKELY TO GIVE
E. HOW LONG WILL IT TAKE TO RAISE FUNDS?

<table>
<thead>
<tr>
<th>Fundraisers</th>
<th>Time From Start of Asking for Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues</td>
<td>today</td>
</tr>
<tr>
<td>Individual donations</td>
<td>today</td>
</tr>
<tr>
<td>On-line donations</td>
<td>1-6 months</td>
</tr>
<tr>
<td>Selling services</td>
<td>1-6 months</td>
</tr>
<tr>
<td>Selling products</td>
<td>3-6 months</td>
</tr>
<tr>
<td>Special events</td>
<td>3-6 months</td>
</tr>
<tr>
<td>Government proposals/contracts</td>
<td>3-24 months</td>
</tr>
<tr>
<td>Corporate proposals</td>
<td>3-24 months</td>
</tr>
<tr>
<td>Foundation proposals</td>
<td>3-24 months</td>
</tr>
<tr>
<td>Direct mail</td>
<td>3-24 months</td>
</tr>
<tr>
<td>Major individual donors</td>
<td>6-48 months</td>
</tr>
<tr>
<td>Planned giving (bequests)</td>
<td>3-20 years</td>
</tr>
</tbody>
</table>

F. GIVING VEHICLES: DIVERSIFY YOUR FUNDRAISING PLAN

<table>
<thead>
<tr>
<th></th>
<th>Fit with Mission</th>
<th>Time Needed</th>
<th>New Info</th>
<th>Size Donor Pool</th>
<th>Amount of Help Needed</th>
<th>Profit /Loss</th>
<th>Front Money</th>
<th>Easy to Repeat</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board Ask New Target Market #1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board Ask Current Donors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business: small sponsorships-local</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate sponsorships: local</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate grants/sponsors: regional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate grants/sponsors: national</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E-vites to give, to events</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation grants: local</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation grants: regional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Foundation grants: national</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government grants: township</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government grants: county</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government grants: state</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government grants: federal</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Government: legislative initiative monies</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail annual gift letters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail special gift/campaign letters</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Membership dues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phonathon</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special event: food</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special event: activity</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special event: networking</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special event: educational</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Telemarketing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
G. THE MOST SUCCESSFUL APPROACH:
JUST ASK: FACE TO FACE

- phonathons/telemarketing
- special events
- corporate and foundation visits
- individual donor request

Ground Rules in Asking for $$$:

- Make your own gift before asking others
- Bring written materials as backup
  - Practice
  - Nervous = good

1. brief intro letter describing program and requesting a meeting to discuss further
2. phone call to set up meeting
3. meeting at which contribution is discussed and requested
4. thank you notes

THE DONOR MEETING

1. Lead prospects -----> their own interests and values
   Get them to talk about their motivators

2. Listen: feed back their ideas

3. Share/sell the idea of your organization and its mission; discuss programs and ideas, not costs and needs

4. Based on their motivators, refine your appeal

5. Make sure to actually ask for $$$
   - be direct about the amount; better to ask for too much than not enough
     a. ask your prospect to consider a specific gift or gift range
     b. name the amount
     c. then be quiet. Let them think and let them respond.

6. If no:
   a. ask them to set their conditions for saying yes:
      what would have to happen to make them donate?
   b. find out why they're turning you down:
      priorities? timing? concerns about the organization? credibility?

7. If yes,
   a. individuals should sign a pledge form at the meeting.
   b. corporations and foundations should be asked when the best time for proposal submission is, exactly how much to request, the internal process, and the real likelihood

   Follow up meeting(s) with a thank you note.
The Importance of Cultivation: Networking, Events, and Members
By Rob Lukens, Executive Director, Historic Yellow Springs, Inc.

1. Introduction: Brief Overview of Historic Yellow Springs

2. The Position of Historical Organizations in the Funding Arena

3. Being Visible

4. Cultivation Means Everyone

5. The Number Game – focusing on quality, not quantity

6. Beware of Events

7. Closing Tips and Thoughts
A. Introduction

B. Overview of the Chester County Conference & Visitors Bureau
   1. mission
   2. membership promotion

C. Overview of Chester County Conference and Visitors Bureau Foundation
   1. tourism awareness and development

D. Foundation Tourism Grant Program – goals, criteria and contact information

E. Questions

Nina Kelly
Director of Communications
Chester County Conference and Visitors Bureau
17 Wilmont Mews, Suite 400
West Chester, PA 19382
Phone: 610-719-1730 ext. 201
Fax: 610-719-1736
Web: BrandywineValley.com
Pennsylvania Foundations Online is a service to non-profit organizations to help them perpetuate their missions by locating funding from foundations. We strive to be socially responsible and supportive of our customers. Therefore, our moderate pricing structure is aimed at helping smaller organizations have access to the very best information possible, while providing larger organizations with a robust research tool. The information available in the database will enable organizations to easily locate charitable foundations that will support their missions.

Pennsylvania Foundations Online is owned and managed by a team of professionals who bring decades of experience in grantsmanship, fund raising and non profit management, along with the necessary technological skills to ensure you will continue to receive the quality service and information you need. We are committed to bringing our customers the very best research tools about funders making grants to support initiatives in Pennsylvania.

Meet our team!

Constance Carter, CFRE, President, has decades of experience in non-profit fundraising, including campaign management, annual campaigns, marketing, grant research and writing, and strategic planning.

Corrine Sylvia, CFRE, Secretary, brings more than 30 years of expertise in non-profit fundraising, including feasibility studies & campaign management, annual campaigns, grantwriting and research, training, and planning.

David Carter, NHA, Treasurer, brings 35 years of experience in non-profit management and finance.

Donald Nye, PhD, Executive Director, is skilled in management, web-based technologies, and database strategies.

PENNSYLVANIA FOUNDATIONS ONLINE
520 Clarks Lane
West Chester, PA 19382

http://pafoundations.net/index.php
Welcome to Pennsylvania Foundations On Line!

This guide will help you navigate the database and produce the most effective search possible.

Foundation Name
The first item on the screen is Foundation name. If you have a specific foundation you wish to search, just enter the foundation’s name. Press the search button and a list will appear. Click on the foundation that you are searching.

Region
The next item is the Region you are searching. This box allows you to select the region in which you are seeking funding and/or to identify foundations that reside and/or fund in the region or regions you select.

Simply enter the region(s) and go on to the next boxes which ask for county, city and zip code. Enter that information if you know it. If you are searching for one particular foundation you can conduct a search without having this information. If you are interested in identifying several foundations do not fill these boxes in.

Major Interest Codes (see next page for more detail)
This box allows you to identify the fields of interest for which you seek funds. You can access the code numbers by clicking on the ? which appears to the left of the words: major interest codes.
For example, if you are a human service organization you would click on the human service interest codes and enter the number in the box. You can use more than one code to narrow your search.

Once your foundation list appears you can double click on any foundation on the list and another page will appear that lists specific information about that foundation. You can print that screen if you want to save a hard copy for your files.

The information on the foundation will contain abbreviations for the following terms:

- Con = Contact Person
- PO = Principal Officer
- P = President
- VP = Vice President
- C = Chairman
- VC = Vice Chairman
- D = Director
- T = Trustee
- Co-T = Co-Trustee
- F = Treasurer/Financial Officer
- S = Secretary
- Preface of A = Assistant
MAJOR INTEREST CODES: TAXONOMY

11 United Ways
12 Child & Family Welfare
13 Youth
14 Disabled/Handicapped
15 Aged/Senior Citizens
16 Minorities/Race Relations
17 Women/Girls
18 Family Planning
19 Substance Abuse
20 Crime/Justice
21 Community Service Clubs
22 Religion-related Services & Agencies
23 Assistance to Needy individuals
24 Neighborhood Associations
25 Housing & Homeless Programs
29 Other Human Services
31 Hospitals / Medical Centers
32 Medical Research
33 Mental Health
34 Medical Education
35 Public Health
39 Other Human Health
41 Primary & Secondary Education
42 Colleges & Universities
43 Scholarships & Fellowships
44 Libraries
45 Community Education & Literacy
49 Other Education
51 Theatre & Dance
52 Music
53 Visual Arts
54 Museums
55 Community Arts
56 Historical
57 Public Broadcasting
61 Catholic Churches / Missions
62 Jewish Synagogues & Charities
63 Protestant Churches & Missions
64 Theological Education
65 Ecumenical Programs & Orgs.
69 Other Religions
71 Conservation & Ecology
72 Zoos / Animal Humane / Wildlife
73 Energy Related
79 Other Environmental
81 International
82 Overseas Institutions / Programs
83 Good Government
84 Sports & Camps
85 Economic Development
86 Public Policy Research
88 Matching Gift Programs
89 Other Miscellaneous
99 Mixed Charitable Giving
Huston (Stewart) Charitable Trust, The

50 South First Ave., 2nd Floor
Coatesville, PA 19320

Telephone: 610-384-2666 Website: www.stewarthuston.org
FAX: 610-384-3396 Email: admin@stewarthuston.org

NOTES & UPDATES: None

ASSETS AT MARKET VALUE: $26,653,283
FISCAL YEAR ENDING: 12-2007
GIFTS RECEIVED: $0
# OF GRANTS: 60
GRANTS TOTALING: $1,066,500

MAJOR INTEREST CODES

GRANTS SUMMARY: About half local/Pa. giving for operating support unless otherwise noted, and some comprise of multiple awards. SECULAR GRANTS: $250,000 to Historic Huston Properties (endowment for Brandywine Museum, $76,000 to Graysone Society, $25,000 to Hands-Crafters Inc. (facility renovation), $15,000 each to Juvenile Diabetes Research Foundation, Brandywine Health Foundation, and City Gate. $13,000 to Chester County Intermediate Unit (child and career development center), $10,000 each to Chester County Women's Services (parenting instruction), and Fairview Cemetery Association. $7,000 to Bridge of Hope (upgrade phone system), $5,000 each to Center on Hearing and Deafness, Junior Achievement of Delaware Valley (elementary school program), Pennsylvania State Police Camp Cadet (one week summer camp), and Quest Therapeutic Services, Inc. (fencing for pleasure). $2,000-$2,500 each to Brandywine Valley Association (Brandywine Watershed), and Coatesville Christmas Parade.

TRINITARIAN/EVANGELICAL GRANTS: $15,000 to Good Works Inc., $9,000-$10,000 each to County Corrections Gospel Mission, House of His Creations (window replacement on maternity home), and Upper Octorara Presbyterian Church. $5,000 each to Lutheran Church of the Good Shepherd (training materials and activities), and Olivet United Methodist Church (operation Thanksgiving & Christmas). $1,500 to Chester County Christian Chorale (Messiah Sing-a-Long). Out of-state secular grants mainly in Savannah area include: $65,000 to Light House of Savannah. $15,000 to Project Smile [GA] (dental supplies), $5,000 to Savannah Port Society (purchase material for dock). Trinitarian/evangelical grants include: $65,000 to Calvary Baptist Day School (furniture & equipment), $50,000 to Grace United Methodist Church (renovations), $47,000 to Living Vine, Inc. (sponsor a resident), $35,000 to United Ministries of Savannah-Emmanuel House (assist with lunches for homeless), $30,000-$35,000 each to United Ministries of Savannah (helping hands), Montgomery Presbyterian Church, Christ Church Children's School (renovations), and Skidaway Island United Methodist Church (support for homeless boys). $25,000 to Asbury Memorial United Methodist Church, $15,000-$24,500 each to Christ Church Partners in Teaching (promote educational instruction for teachers), YMCA of Coastal Georgia (supplies meals and transportation), $10,000-$15,000 each to Cathedral of St. Philip, Christ Church-Partners in Progress (supply equipment and renovations for kitchen), Episcopal Youth & Children's Services (for college scholarships), Union Mission (building renovations), Salvation Army (purchase mini-buses), and Old Savannah City Mission (support building for Fresh Start). $9,000 to His Love Ministries, and $5,000 to Christ Church-Partners in Progress (purchase furniture).

Over half local/Pa. giving; grants are for operating support except as noted and some comprise multiple awards. SECULAR GRANTS: $58,000 to Graysone Society, Inc. (capital projects/programs), $35,000 to Pa. Assn. of Nonprofit Organizations [Harrisburg] (operating support/leadership programs). $30,000 to Nightingale Productions [Philadelphia] (Rebecca Lukens documentary). $25,000 each to Chester County Community Foundation (pledge payments/benefit events), Chester Springs Studio (Coatesville studio/programs), and Primitive Hall Foundation (facility expansion). $20,000 each to Champions of Caring [Villanova], City of Coatesville (neighborhood park), and Ophthalmic Research Associates (minority health care in Chester County). $15,000 each to Handi-Crafters [Thorndale], Lincoln Institute of Public Opinion Research [Harrisburg], and Theatre Ariel [Merion]. $14,000 to Lukens Band. $10,000-$11,000 each to Chester County Assn. for the Blind (employment workshop materials), Cheyney U. (historic house restoration), Coatesville Center for Community Health (building renovation), Coatesville Cultural Society, Family Service of Chester County
(Coatesville operations), Freedoms Foundation of Valley Forge (teacher scholarships/internet project), Friends to Save Beechwood [Bryn Mawr] (restoration), Pa. State Police Camp Cadet (camperships for local children), and Planned Parenthood of Chester County (Coatesville center relocation). $9,000 to W.C. Atkinson Memorial Community Services. $6,500 each to Maternal & Child Health Consortium and Natural Lands Trust [Media] (Sadsbury Wood stewardship project). $5,000 each to Big Brothers/Big Sisters of Chester County (Coatesville outreach program), Chester County Healthy Communities Partnership (Dental Network expansion), Coatesville Parent's Music Club (concert series), Crime Victims' Center of Chester County (Coatesville programs), Kelly Anne Dolan Memorial Fund [Ambler], Easter Seals [Philadelphia] (adaptive summer camp), LaSalle U. Nonprofit Management Development Center (Chester County programs), National Liberty Museum (Freedom Tours), People's Light & Theatre Company (Coatesville school project), Philabundance (Chester County operations), Phoenixville Area Economic Development Corp. (Foundry visitors center), Upattonas School [Glenmore] (Appalachian Trail project), Valley Forge Historical Society (house-catalog collection evaluation), and Whitaker Center for Science & the Arts [Harrisburg] (science exhibits). $2,500-$4,000 each to Center on Hearing & Deafness (volunteers for hospice patients), Coatesville Christmas Parade, Human Services, Inc. (Coatesville School District consultant), Norristown Zoo (winter animal care), and Strings for Schools (Coatesville school programs). Other smaller local/Pa. contributions for similar secular purposes. Out-of-state giving includes $30,000 to Denison U. [OH] (Organizational Studies Program) and $15,000 to National Trust for Historic Preservation [DC] (stabilize six Revolutionary War buildings).

TRINITARIAN EVANGELICAL GRANTS—for religious, educational and social outreach purposes: High grant of $125,000 to Coatesville Bible Fellowship (building repair), $50,000 to Greater Deliverance Church [Coatesville] (elevator construction). $37,500 to Pine Forge Academy [Berks County] (building renovation). $35,000 each to Lan-Chester Christian School (programs/capital needs) and Life Transforming Ministries [Coatesville]. $25,000 to Eastern U. (Emergency Aid Fund/Nonprofit Excellence Award/scholarship benefit). $22,500 to Frederick Mennonite Community (chapel renovation). $20,000 to New Life in Christ (building maintenance/equipment). $17,500 to Good Works, Inc. (building materials). $15,000 to Episcopal Church of the Trinity (capital improvements). $12,000 each to Bridge of Hope (homelessness program) and Friends Boarding Home (new roof). $10,000 each to American Baptist Historical Society [Valley Forge] (curator salary), Brandywine YMCA (challenge course project), Center for Parent/Youth Understanding (radio-audio equipment), Church of the Ascension [Parkesburg] (building renovation), County Corrections Gospel Mission (renovations/staff), Kearsley Retirement Community (stained glass window restoration), Olivet United Methodist Church (emergency food cupboard), Safe Harbor of Greater West Chester (lunch program), Scripture Union [Wayne] (Chester Children's Mission), and Working Wardrobe. $7,500 each to Bethany Christian Services [Fort Washington] (foster-adoptive family recruitment) and YMCA of Philadelphia & Vicinity (child care/summer camp/scholarship support). $3,000-$5,000 each to Chester County Christian Chorale (sing-a-long), Phoenixville Area YMCA (pool renovations), and Upper Octorara Presbyterian Church (preschool scholarships/computers). Out-of-state Trinitarian/Evangelical grants include $86,500 to Bridges for Peace [OK] (building renovations/food bank outreach); $45,000 to Christian Friends of Israel [Israel] (Russian immigrant assistance); $30,000 to Project Light [VA] (Bible-based literacy programs); $20,000 each to International Christian Embassy Jerusalem-USA [DC] and Urban Promise [NJ] (building purchase/programs/salaries); and 34 grants to GA (mostly Savannah) totaling $551,384.

OUT-OF-REGION GIVING WITHIN PA: None

APPLICATION GUIDELINES: The Foundation reports that Pa. giving support focuses on Chester County (particularly Coatesville) and Georgia (especially Savannah). Priority areas of interest are Religion—particularly Trinitarian/Evangelical activities, as well as Health & Human Services, Education, Civic Affairs, and Arts & Culture. Overall, at least of 60% of giving must be for Trinitarian/Evangelical activities—defined to include all Protestant churches (except Unitarian churches) and affiliated/related organizations which follow and exemplify the Christian Gospel or charitable endeavors such as preaching/conducting services, offering religious instruction, distributing religious literature, providing food/shelter to the homeless, maintaining orphanages, operating hospices, and conducting drug/alcohol abuse prevention and rehabilitation programs. Most grants are for specific projects, capital projects, general operations, or equipment purchases/upgrades; requests must address a particular community need/issue. The Trust seeks to support organizations which encourage commitments of human resources, i.e. community volunteers, and prefers not to be the major source of an organization's funding. Generally, no grants are awarded to/for individuals; endowment; benefit tickets/advertising; operating deficits; document publications; pass-through funds; fraternal, veteran, labor, or local civic organizations, volunteer fire companies; political parties/candidates, and groups involved in influencing legislation. Prospective applicants initially should make a telephone inquiry about the feasibility of submitting an application and to request the Request for Contribution Form —and the 15-page Distribution Guidelines booklet (both available on the website). In brief, applicants for Secular grants must submit an initial Letter of Intent (6 pages maximum—see Distribution Guidelines booklet) before a January 15th deadline;
Trinitarian/Evangelical grant applicants must submit a full proposal (refer to the Distribution Guidelines booklet for details) before the March 1st or September 1st deadlines. Contact the Foundation regarding possible use of Delaware Valley Grantmakers Common Grant Application Form -- http://www.dvg.org/grantseekers/CGA_CRF.pdf. Site visits usually are made to organizations being considered for a grant. The Trustees award grants at June and December meetings.

**PUBLICATIONS:** Annual Report; Distribution Guidelines booklet and Grant Request Attachments sheet; Request for Contribution Form; informational brochure

**CONTACT PERSON, OFFICERS, DIRECTORS, TRUSTEES & DONORS:** Scott G. Huston (Executive Director) -- Charles Lukens Huston, III (T) -- Samuel A. Cann, Esq. (T) -- Alex L. Cann, Sr. (T)
Components of a Grant Proposal

Cover sheet:
- check to see if the foundation requires a cover sheet
- some foundations have their own; be sure you are using the latest version
- be accurate

History/Mission: brief – 1-2 paragraphs; emphasize important points
- how long has your cause been in existence
- mission statement – clear & strong – paraphrase
- describe the general work of the organization; the programs
- does the organization excel at anything? Has it won any awards?
- can you put anything in for credibility enhancement? such as credentials of staff, board, etc.

Need: make a case for why your program needs to happen – the absence of the program is not a case (unless it's an obvious, generally accepted valuable thing such as, “the building doesn’t have a roof”)
- think about what you can't do because you have this need; or what’s happening that’s bad because the need exists – interior leaks because of a bad roof, etc.
- state what you COULD do if you had it met – protect and use the building, etc.
- WHO will benefit – human terms – not the organization's benefit
- use research and statistics to back you up if they will help make the case

Goals and Activities: How will you meet this need?
- describe how you'll meet the need
- be specific; who will do it (qualified contractors, experts in the field, etc).
- timelines – how long will it take; when will it start and end
- this section lets the funder know you have thought this out and you have a well developed project – you've considered all angles

Outcomes:
- relates back to the need – what needs will be met as a result of your project? what will happen?
• should be measurable and quantifiable – areas restored, # of people served, workshops delivered, etc.
• can also be subjective – people will be more comfortable, quality of life better, life is safer, healthier; building is preserved
• you will be reporting on whether or not you reached these outcomes, so think of that as you write them; they should be realistic and achievable

**Evaluation:** closely related to outcomes – how will you know whether you reached your outcomes or not?
• this is a priority of most funders now – they want to know whether their grant was well spent; it also relates to accountability
• what group within the organization will evaluate how the program went:
  o department, committee, board – everyone ultimately reports back to the board
  o describe how this group is qualified to evaluate the program
    (professionals on a committee; consumers, etc.)

**Budget:**
• many foundations accept a simple income/expense budget for the project – be sure the numbers add up correctly
• they will also want the operating budget for the whole organization
• include everything you can think of in the project budget – shipping, installation, 10% overhead costs if you can do it, think broadly – question the people involved to MAKE SURE you have all the costs
• no need to be overly complicated – simple is good

**Attachments:**
• usually foundation guidelines are specific about this – none, few, many
• include items that will help you sell your case – newspaper articles, letters of support, selected photos (sometimes) – don't send videos, expensive publications unless the foundation has asked for them

DON'T USE BINDERS!

Number the pages

**How to do a cover letter or a letter of intent:** you can include material in a cover letter that won't fit into the proposal – reference personal connections, thanks for a visit, refer to a conversation, invite to make a site visit, etc.
• introductory paragraph – state the amount of money you are asking for and what it’s for; link your mission with the funder’s; include anything significant or compelling you can say about organization or the project

• 2nd paragraph – brief history and mission – several sentences only

• 3rd paragraph - brief explanation of need, project and outcomes (one sentence each). If writing a letter of intent, you may do several paragraphs about this.

• close – give name and phone # to call for questions, more info

Use your network to advocate for your proposal.
GRANTSEEKING RESOURCES

Books


Websites

- **Grant Proposal Writing Tips**, [www.cpb.org/grants/grantwriting.html](http://www.cpb.org/grants/grantwriting.html)
  Resource published by the Corporation for Public Broadcasting that provides guideposts for the grant-writing process.
  – subscribable database of 2,000 Pennsylvania foundations; sliding fee scale; excellent details and tips
  Ten tips for writing a successful proposal, along with additional resources for grant writers.
- **Grant Writing Tips**, [www.seanet.com/~sylvie/grants.htm](http://www.seanet.com/~sylvie/grants.htm)
  Grant-planning questions, basic elements of good proposals, and links to grant resources from an experienced grant writer.
- **Grant Writing Tip Sheets**, [http://grants.nih.gov/grants/grant_tips.htm](http://grants.nih.gov/grants/grant_tips.htm)
  General grant-writing tutorials as well as specific information about applying for National Institutes of Health grants.
- **Non-profit Guides**, [www.npguides.org](http://www.npguides.org)
  Grant-writing tools for nonprofits, including tips, sample proposals, and links.
- **Writing a Successful Grant Proposal**, [www.mcf.org/mcf/grant/writing.htm](http://www.mcf.org/mcf/grant/writing.htm)
  The Minnesota Council on Foundations' detailed outline of a grant proposal, which is particularly oriented to project proposals.
• **The Foundation Center**, [www.foundationcenter.org](http://www.foundationcenter.org) – subscribable database of national foundations; also training programs & publications. The Foundation Center in NYC is the industry leader in grant area. They have free and low-cost tutorials online. [http://foundationcenter.org/getstarted/tutorials/shortcourse/index.html](http://foundationcenter.org/getstarted/tutorials/shortcourse/index.html)

• **The GrantsmanShip Center**, [www.tgci.com](http://www.tgci.com) – excellent, affordable publications about grantseeking; workshops and classes

• **Commonwealth of Pennsylvania**, [www.inventpa.com](http://www.inventpa.com) – resource for state government grants

• **Federal grants**, [www.grants.gov](http://www.grants.gov) – contains all you need to know about seeking federal funding

• **US Census Information**: [www.census.gov](http://www.census.gov); click on “American Fact Finder;” another resource on this page is the Statistical Abstract, a summary of statistics on the social, political, and economic organization of the US: [www.census.gov/compendia/statab/index.html](http://www.census.gov/compendia/statab/index.html)

### ADDITIONAL NONPROFIT RESOURCES

This is the most comprehensive free resource of nonprofit management articles available, including Fundraising.

[http://www.lasallenonprofitcenter.org/educational/](http://www.lasallenonprofitcenter.org/educational/)
For in-person training, LaSalle Nonprofit Center is the regional leader. Their half and full day fundraising workshops will give you a tremendous amount of info. Most sessions offered in Center City, and it’s worth the trip.

[http://www.dvg.org/grantseekers/index.htm](http://www.dvg.org/grantseekers/index.htm)
Delaware Valley Grantmakers has a high quality list of links on this page, to provide with additional fundraising websites.
TODAY’S PRESENTERS

Karen Simmons, President/CEO
Chester County Community Foundation
28 W. Market Street, The Lincoln Building, West Chester, PA 19382
610/696-8211 www.chescocf.org info@chescocf.org

Rob Lukens, Executive Director
Historic Yellow Springs
P. O. Box 62, 1685 Art School Road, Chester Springs, PA 19425
(610) 827-7414 x14 www.yellowsprings.org director@yellowsprings.org

Nina Kelly, Director of Communications
Chester County Conference & Visitor’s Bureau
17 Wilmont Mews, Suite 400, West Chester, PA 19382
(610) 719-1730 x.201 www.brandywinevalley.com nina@cccvb.org

Connie Carter, CFRE and Corrine Sylvia, CFRE
Development Consulting for Non-Profits
Directory of Pennsylvania Foundations
520 Clarks Lane, West Chester, PA 19382
(610) 793-3322 cone27@aol.com csylvia@prodigy.net www.sylviacarter.com

CCHPN
P.O. Box 174
West Chester, PA 19381
www.CCHPN.org

Chester County Historic Preservation Network