

**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



P.O. Box 174  
West Chester, PA 19381  
[www.CCHPN.org](http://www.CCHPN.org)

**Chester County Historic Preservation Network**

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.



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

Chester County Historic Preservation Network

# Chester County COMMUNITY FOUNDATION

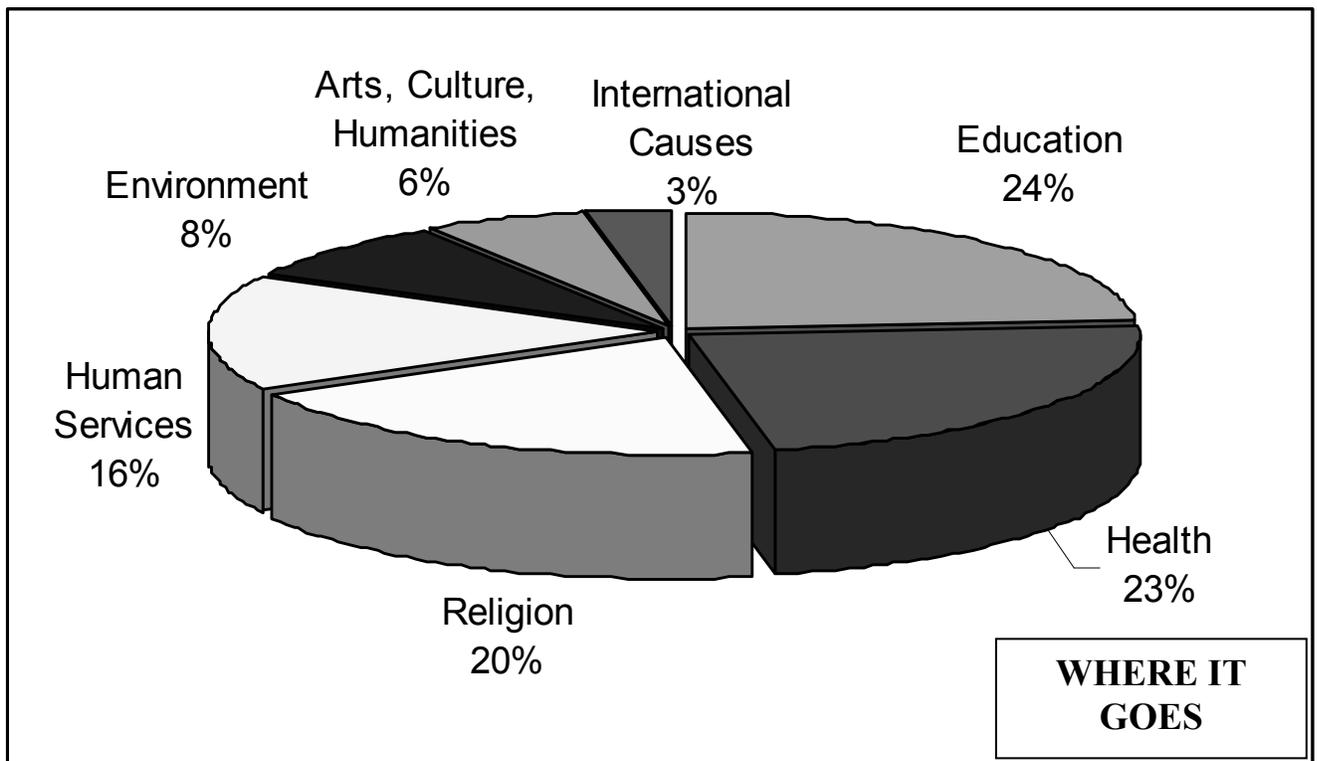
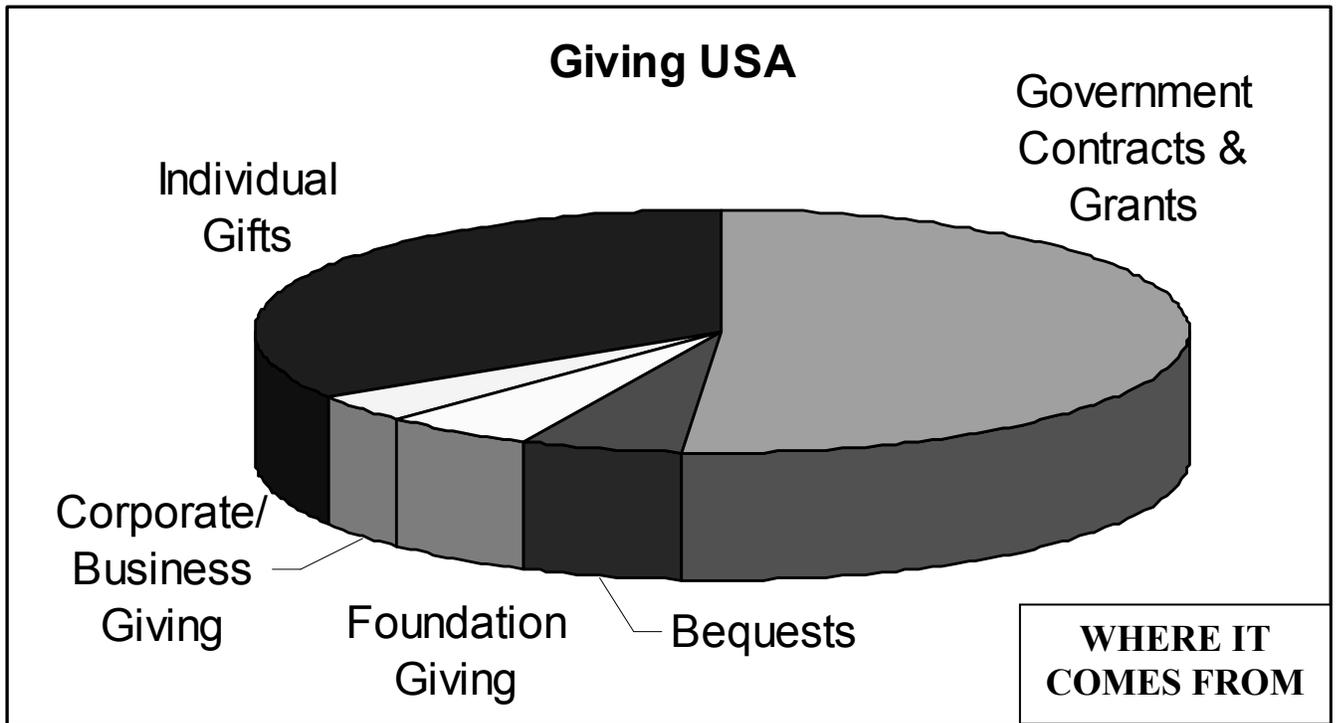
28 West Market Street, West Chester, PA 19382  
(610) 696-8211 www.CHESCOCF.org

Today's event is co-sponsored by the Chester County Community Foundation.

## 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 McIlviane 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?                   | Strategic Planning                     |
| B. Why do we need the money?             | The Case Statement/Elevator Chat       |
| C. Why do people give?                   | Donor Motivation                       |
| D. Who should we approach?               | Target Markets                         |
| E. How long will it take to raise funds? | Timing                                 |
| F. What are giving options?              | Fundraising Strategies/Diversification |
| G. The most successful fundraising       | Face to Face Asking                    |
- 11:45 **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**



## **PLANNING FOR FUNDRAISING**

- 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.)*

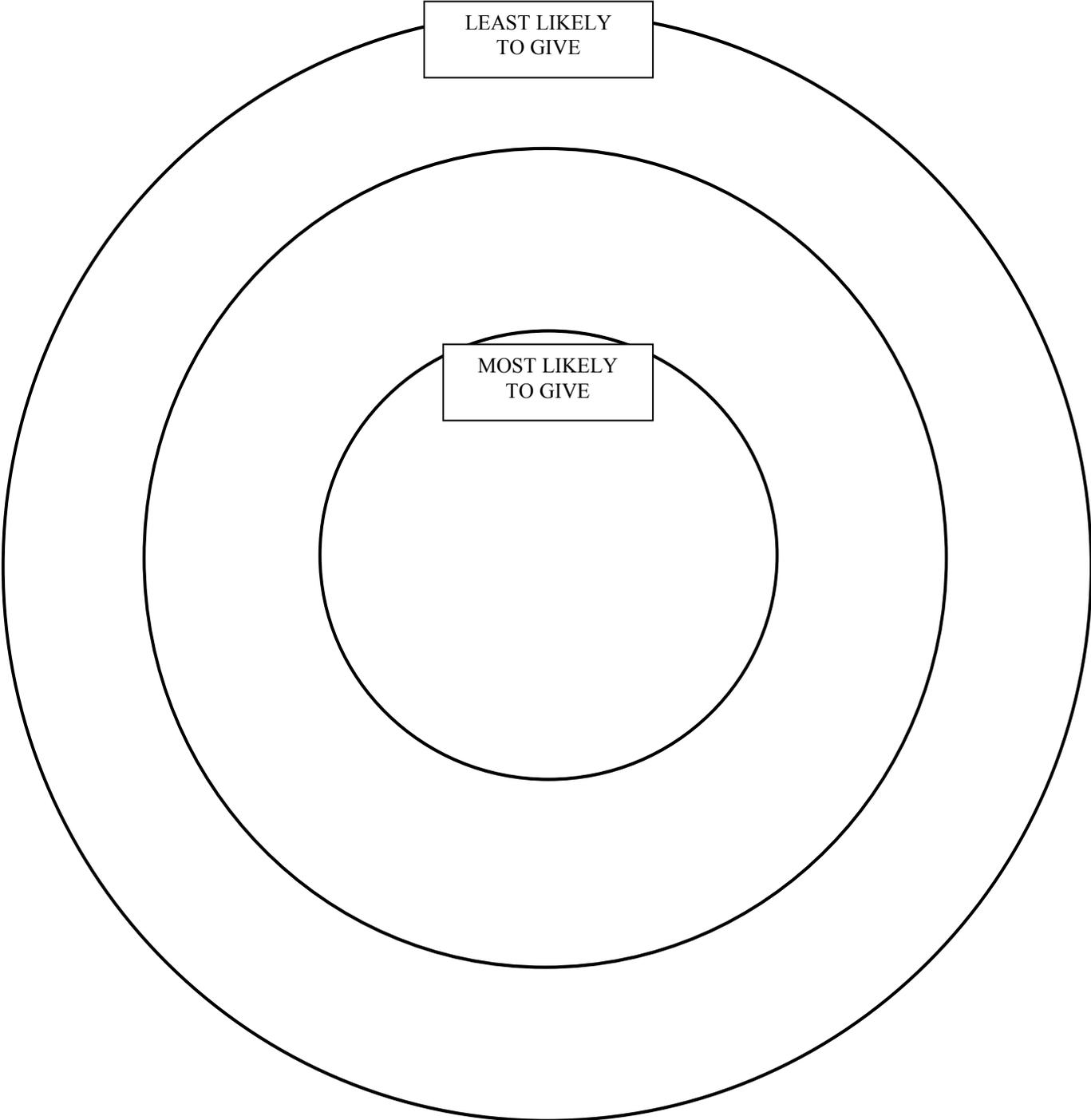
**Why “Yes”?**

**Why “No”?**

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**D. WHO SHOULD WE APPROACH? TARGETING DONOR GROUPS**



**E. HOW LONG WILL IT TAKE TO RAISE FUNDS?**

<b>Fundraisers</b>	<b>Time Fom Start of Asking to First Profits Available for Spending</b>
Dues	today
Individual donations	today
On-line donations	1-6 months
Selling services	1-6 months
Selling products	3-6 months
Special events	3-6 months
Government proposals/contracts	3-24 months
Corporate proposals	3-24 months
Foundation proposals	3-24 months
Direct mail	3-24 months
Major individual donors	6-48 months
Planned giving (bequests)	3-20 years

**F. GIVING VEHICLES: DIVERSIFY YOUR FUNDRAISING PLAN**

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

**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**

**CHESTER COUNTY CONFERENCE & VISITORS BUREAU**

**By Nina Kelly, Director of Communications**

**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](http://BrandywineValley.com)



<http://pafoundations.net/index.php>

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>



## Pennsylvania Foundations On Line Users Manual

### 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

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## MAJOR INTEREST CODES: TAXONOMY

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

# Pennsylvania Foundations Online: Foundation Profile

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## Huston (Stewart) Charitable Trust, The

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

SE Region  
Chester County  
EIN: 23-2612599  
Year Created: 1990

Telephone: 610-384-2666

Website: [www.stewarthuston.org](http://www.stewarthuston.org)

FAX: 610-384-3396

Email: [admin@stewarthuston.org](mailto:admin@stewarthuston.org)

**NOTES & UPDATES:** None

<u>ASSETS AT MARKET VALUE</u>	<u>FISCAL YEAR ENDING</u>	<u>GIFTS RECEIVED</u>	<u># OF GRANTS</u>	<u>GRANTS TOTALING</u>
\$26,853,283	12-2007	\$0	60	\$1,066,500

### MAJOR INTEREST CODES

12-13-14-15-18-19-22-25-29-31-41-43-55-56-63-64-65

**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 Graystone 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: \$55,000 to Hope 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:** \$88,000 to Graystone Society, Inc. (capital projects/various 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

## Pennsylvania Foundations Online: Foundation Profile

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(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), Upattinas School [Glenmoore] (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 **\$651,384**.

**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;

Pennsylvania Foundations Online, 520 Clarks Lane, West Chester, PA 19382

Document created on 03/09/2009 at 1:03:57 PM - Page 2/3

## **Pennsylvania Foundations Online: Foundation Profile**

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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](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:
  - department, committee, board – everyone ultimately reports back to the board
  - 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
- 2<sup>nd</sup> paragraph – brief history and mission – several sentences only
- 3<sup>rd</sup> 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.**

Constance Carter, CFRE and Corrine Sylvia, CFRE  
Development Consulting for Non-Profits, [www.sylviacarter.com](http://www.sylviacarter.com)

## GRANTSEEKING RESOURCES

### Books

- Larissa Golden Brown and Martin John Brown, *Demystifying Grant Seeking: What You REALLY Need to Do to Get Grants* (San Francisco, 2001).
- Beverly A. Browning, *Grant Writing for Dummies* (Hoboken, N.J., 2001).
- Susan L. Golden, *Secrets of Successful Grantsmanship: A Guerrilla Guide to Raising Money* (New York, 1997).
- Grantsmanship Center, *Program Planning and Proposal Writing* (Los Angeles, 1981).
- Cheryl Carter New and James Aaron Quick, *Grantseeker's Toolkit: A Comprehensive Guide to Finding Funding* (New York, 1998).

### 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.
- **Directory of Pennsylvania Foundations/Pennsylvania Foundations On-Line**, [www.pafoundations.net](http://www.pafoundations.net) – subscribable database of 2,000 Pennsylvania foundations; sliding fee scale; excellent details and tips
- **Grantwriting Basics**, [www.gse.harvard.edu/~hgseosr/toolbox.html](http://www.gse.harvard.edu/~hgseosr/toolbox.html)  
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>
- **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**

**<http://www.managementhelp.org/>**

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

**<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>**

Delaware Valley Grantmakers has a high quality list of links on this page, to provide with additional fundraising websites.

## TODAY'S PRESENTERS

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**Directory of Pennsylvania Foundations**

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