I. CHESTER COUNTY COMMUNITY FOUNDATION
GRANT PROPOSAL SUMMARY SHEET

One page only. This page will be shared electronically with Grant Committee Members & Fund Advisors.
Note: If Philanthropy Network of Greater Philadelphia’s Common Grant Application is used, the Community Foundation’s Summary Sheet MUST accompany application.
To obtain an electronic version of this application, visit www.chescocf.org

Date 9/15/18

Contact Information
Organization Name: Philadelphia Area Great Careers Group  Executive Director Name: Lynne Williams
Address: Chesterbrook, Valley forge PA  Executive Director E-mail: Director@GreatCareersPHL.org
Phone: 610-405-9756  Board of Directors Chair Name: Steven Ritchey
Website: www.greatcareersphl.org  Primary Contact Name: Steven Ritchey, Chairman
Year Incorporated: 2017  Primary Contact E-mail: Chairman@greatcareersphl.org

Has your nonprofit ever applied to the Community Foundation?  Yes ___  No X_  Not Sure__
Has your nonprofit ever received funding from the Community Foundation?  Yes ___  No X_  Not Sure__
No _Donor Advised Fund(s)   No _Fund for Chester County    _Don’t know/Not sure

Field/s of Interest:
___ Arts, Culture & Humanities ___ Environment/Animal Welfare ___Education
___ Health _X_ Human Services ___ Religion

Organization Information:
Geographic Area Served (If not all of Chester County, specify primary Chester County regions served):
Chester County and much of the 5 county Southeastern PA, Phila Metropolitan area.

Describe Population Served and Annual Number of People Served:
We serve the unemployed, the underemployed, the self-employed, and the employed, as well as the organizations (businesses and nonprofits) that may employ them. Whenever possible, we focus on the underrepresented, those in unique circumstances entering the civilian workforce, and the disadvantaged (including minorities, gender identity populations, Veterans, and those impacted by ageism).

Mission: Our “Why” > Everyone deserves an opportunity to earn an income.
We serve that mission by providing Workforce development and the tools for effective Job Transition/Search through education, resource materials, support services, and networking connections to individuals and businesses. We empower an inclusive and diverse multigenerational workforce to optimize the evolving workplace and gig economy through awareness and preparation.

Proposal Summary:
A) Upgrade Accounting: Move accounting to QuickBooks Online (nonprofit addition) with professional assistance to enhance capabilities as well as assure continuity, and have 2018 Financials Professionally reviewed to facilitate Grant applications

B) The Great Careers Group considers it essential to gain control of its membership from the online Meetup.com which only allows access to limited sign-up information and forces all communication to go through its interface. The organization took advantage of it’s nonprofit status and TechSoup relationship and acquired free licenses for the Salesforce CRM with it’s Nonprofit application overlays and added Click and Pledge an event, membership, and donation management application. These applications require ongoing administration and updating. We are seeking funds to contract for a part-time administrator to work with the volunteer developers to assure system integrity.

If Capacity Building Proposal, the focus is:
___Mission, Vision & Strategy  _X__Governance & Leadership   ___Strategic Relationships
___Fundraising & Development  Other: __and Foundational Operations

Annual Budget $_.8610_________  0___ # of Full-Time Equivalent Paid Staff
64 % of budget for program expenses  7___ # of Board Volunteers
53 % of budget for administrative expenses  18___ # of Active Non-Board Volunteers
<1% of budget for fundraising expenses  6027_ # of Volunteer Hours

Top 3-5 funding sources:  Monetized Programs and Events, Fee Based Job Search Training Workshops Memberships, Donations

Grant Amount Requested from the Community Foundation:  $5,000_____________
II. CHESTER COUNTY COMMUNITY FOUNDATION
GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

Organization’s history, goals, key achievements and distinctiveness

The Philadelphia Area Great Careers Group (also referred to as the Great Careers Group and PAGCG) was started in 2010 as a Meetup organization to support people in job search and job transition. In August of 2015 they handed administration of the Meetup to Lynne Williams, now the Executive Director. In the most recent 3 years (to August 2018) through networking, active personal promotion in the area, free seminars, and online promotion, the Group, registered through Meetup to join a group or meeting, has doubled in size.

Lynne Williams formalized the organization into a legal entity in early 2017 and filed for and was granted IRS 501(c)(3) nonprofit status in April of 2017. With the expectation that these Board would be an active working entity, Board members are expected to work no less than 12-15 hours a month. Board members were enlisted with specific skills and experience The Great Careers Group held its first Board meeting in June of 2017. electing officers and assigning each Board member with an area of oversight. The all-volunteer Board immediately began work to:
- Formalize the nonprofit’s structure,
- refine and memorialize existing processes and systems,
- develop necessary policies, and new procedures
- define a clear mission, vision, and strategy,
- expand meetings and service offerings as well as
- monetization of some new offerings in and
began the task of that would form foundation for the organization.

The treasurer, and experienced nonprofit accounting professional, serves as the group’s accountant utilizing QuickBooks. A volunteer/donor stepped forward to cover the costs of QuickBooks for the first year.

As the PAGCG was originally organized and operated through Meetup.com, only very limited contact information was available in any organized manner on the membership. Meetup.com also retains control the channels of communications. In September of 2017 the Great Careers Group secured free licenses for Salesforce. Utilizing the set-up of the application as “workforce skills development,” proceeded to enlist volunteers to install and configure Salesforce with the Nonprofit application overlay as well as “Click and Pledge” a fundraising, membership processing and event registration application. While Salesforce instances were provided for free by the Salesforce Foundation, the Click and Pledge application carries a monthly fee which a donor/volunteer stepped up to cover for the first year.

The Great Careers Group and its all-volunteer staff provide approximately 400 facilitated Career Transition Meetings a year. Each free weekly Great Career Group support focused meeting usually serves between 5 and 20 people, while larger evening meetings with speakers often serve 50-65 people. All Great Career Group support meetings are free as are
The vast majority of meetings with speakers. Donations are solicited at the larger speaker meetings.

Funding request $5,000, (Additional Funds for these projects as required will come from operations as a priority.)

Description of key initiatives in need of funding

OPERATIONAL FOUNDATIONS

A) Necessary accounting enhancements and professional review
   1. Move accounting to QuickBooks online – (With outside accountant review)
      Annual QuickBooks Online 3 Seats with nonprofit Pack $125 (TechSoup)
      Outside Accountant Assistance and review $500
   2. Initial External Annual Financial Accounting Review $1,750-$2,000

B) Administration of Salesforce, Registration Simplification, Reporting Development
   1. A paid part-time Salesforce administrator ~2 hrs. per week $2,400-$3,600
   2. Automating data “loading” from Click and Pledge to Salesforce $500

Specific needs and issues to be addressed

A) Moving Accounting to QuickBooks online and adding additional users assures continuity in case of unexpected changes in responsible volunteer staff or board officers. An external accounting review is necessary to confirm proper accounting and, a review may be required for larger grants.
   ISSUE: Good governance and Assured Continuity

B) Regular administration of Salesforce is required to measure activity and client service levels, track individual donors and, deliver accurate reporting. Development of an automated data loading process will reduce time spent on redundant tasks and allow administrator and volunteers to focus on enhancements and revenue generating activities.
   ISSUE: Accurate Reporting and measurement of activities is essential to management.

Organizational impact if initiative is undertaken

How will this grant enhance your organization’s capacity?

A) Upgrade and move to QuickBooks online assures organizational continuity. Accounting Enhancements and Review will set the Great Careers Group up to increase program activity and secure grants to fund the services we provide free.

B) Salesforce administration will assure continuity and improve service level management. Automation will reduce the hours required for the current regular tasks to make time for enhancing data acquisition, reporting and ongoing group and membership client expansion.

How will this increase in organizational capacity be measured?

The Accounting project will result in the first reviewed annual financial reports which will speak for themselves. Success with additional Grant applications and results will be compared year to year.

The Salesforce Project will enable regular reporting of meetings, client/members activity and growth. Such reporting is manual and only rudimentary at this time.
Activities to implement the initiative. Please include a description of the expected activities; timeline and costs to implement the initiative. If external consulting services are required, include the anticipated costs and expertise of the consultants to be hired.

A) Accounting –
The Software has been sourced (TechSoup). Purchase will take place as soon as possible. The Great Careers Group will not wait to secure a grant for this. PAGCG expects to create 2 brief RFPs for 1) conversion assistance ($500) and 2) for an annual review ($1750-$2,000) before the year-end. The conversion to QuickBooks online is considered critical and will be funded from operations or donations if a grant is not in place. Once funding is secured but not later than February 2019 PAGCG will solicit local accounting firms (3 or more) to review the 2018 results.

B) Salesforce –
The current volunteer Salesforce staff will:
1) Create a detailed Administrator Weekly responsibilities list, (in Process)
2) Define the necessary skill requirements for the part-time role (by 11/2)
3) Work with the Board’s Human Resource committee on a Job Desc. (by 12/2)
4) Solicit for a contractor when funding is secured (~2/19)

Why it is important to fund this now.
These foundational improvements are needed now to allow the Great Careers Group to advance goals, measure activities, and guide strategy. These are considered critical, and members of the Board will prioritize using whatever other funds may come available to achieve these goals. If the Great Careers Group fails to secure outside funding, these initiatives will consume significant resources. Resources intended to develop additional meetings in both northern and southern Chester County as well as limit the development and distribution of educational materials and webinars.

How impact and results will be demonstrated
The Accounting upgrade will result in improved ability to approach larger Grantmakers and provide the basis for comparative improvements. The Upgraded reporting and production of a reviewed statement speaks for itself to a significant degree. Regular Meeting, Member/Client, and Reporting will be available for the Board members and their committees and for Donor and Grantmakers. Grant application requirement (and results) will be compared year to year.

Financials and Budgets provided as separate documents