

I. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL SUMMARY SHEET

Date: September 3, 2020

Contact Information

Organization Name: The Parkesburg POINT ED/CEO Name: Dwayne Walton
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Year Incorporated: 2003

FEIN: 03-0399261

Board Chair Name: Larry Beaver

Board Chair Approval (check here):

Primary Contact Name: Sarah Daniels

Primary Contact E-mail:

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Organization Information:

Field/s of Interest:

Arts, Culture & Humanities

Environment/Animal Welfare

Education

Health

Human Services

Religion

Mission: The POINT's mission is to empower youth and their families to live victoriously by offering a safe, engaging and spirit-filled environment.

Geographic Area Served: The Greater Parkesburg and Coatesville Communities (Western Chester County).

Describe Population Served & Annual Number of People Served: The POINT serves over 400 youth ages 8- 18 annually. POINT students primarily come from the Octorara School District; however, approximately 20% of students travel from Coatesville Area School District. Most POINT students come from single-parent households, 90% of which fall below the poverty level and many of whom have experienced homelessness, transient housing conditions, mental or physical abuse, hunger, are struggling or failing academically and have parents addicted to drugs/alcohol.

Annual Budget: \$950,000

71.6% of budget for program expenses

7.4% of budget for administrative expenses

21% of budget for fundraising expenses

100 % total

4 FT/6 PT # of Full-Time Equivalent Paid Staff

14 # of Board Volunteers

274 # of Active Non-Board Volunteers

7,500 # of Volunteer Hours

Top 3-5 funding sources: **W.W. Smith Charitable Trust, Iron Mountain LLC, Caroline Alexander Buck Foundation, Nelson Foundation, & Connelly Foundation.**

Is this grant proposal for: Capacity Building OR General Operating ?

If Capacity Building Proposal, the focus is:

Mission, Vision & Strategy Governance & Leadership Partnerships & Collaborations

Fundraising, Development & Marketing Technology Other: _____

Grant Amount Requested from the Community Foundation: \$1,950

Proposal Summary: The POINT respectfully requests \$1,950 to help fund a one year membership for Every Day Planned Giving LLC's, "Lead with Legacy", a dynamic 12-month program to help The POINT create and build a sustainable Legacy Giving Program. The total program cost is \$7,800 (\$650/m). \$1,950 will help cover 3 monthly payments. In 2019, The POINT received a \$1,000,000 endowment gift and believes that now more than ever, it is critical that we invest in a Legacy Giving Program to help grow our endowment. Investing in The POINT's development of a formal Legacy Giving Program will ensure continued growth and sustainability for The POINT.

II. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

1. Nonprofit's history, goals, key achievements & distinctiveness

The POINT was collaboratively founded in 2003 by local businesses, churches, and community leaders in the Borough of Parkesburg. Since its founding, The POINT has developed innovative strategies to address spiritual, physical, emotional and academic needs for an ever-increasing number of youth and has developed a reputation for excellence within the Greater Western Chester County community.

After 10 years of renting a small warehouse, The POINT launched a capital campaign in 2011-2013 which resulted in the purchase of a 4.25-acre property in Parkesburg. The property now hosts a 22,000 sq./ft. community center with a full gymnasium, cafeteria, e-gaming center, ninja warrior obstacle course, commercial kitchen, student chapel, boxing gym, trade- skills workshop, academic classrooms and our community's local food cupboard. Most recently, The POINT completed the addition of an outdoor skatepark and basketball court .

Today, The POINT is open free of charge 5-6 afternoon/evenings a week and reaches over 1,000 youth through community outreach (bookbag drive, meals, motivational speaking) and directly serves over 400 youth through our core after school and evening programs. With the help of over 275 volunteers and 20+ local churches, our program holistically addresses the physical, academic, emotional and spiritual needs of our community's most vulnerable youth. Each of our programs are designed around the following goals:

- 1) Provide access to a safe and supportive environment
- 2) Empower students to develop leadership skills, confidence and a positive identity
- 3) Encourage students to stay in school & set goals for post-secondary education/employment
- 4) Create access to activities, education and resources that promote a healthy lifestyle
- 5) Foster student's spiritual exploration and development

We are pleased to report that in our most recent survey of core students, 98% of students said they feel safe, supported and cared for at The POINT, 76% said they feel more motivated academically, 59% improved literacy skills and 77% plan to enroll in college or a tech school post-high school. Additionally, 84% feel more confident, 76% improved self-esteem, and 76% made new friends. And finally, 55% of students are getting in trouble less, over 92% said The POINT helps them avoid alcohol and drugs and 83% said it helps them avoid skipping/dropping out of school.

2. Funding request

• Description of key initiatives

- 1) Secure funding to invest in training our Staff and Board about their roles in legacy giving and the development of a formal Legacy Giving Program.
- 2) Purchase a 12 Month "Lead with Legacy" Program via Everyday Planned Giving, LLC.
- 3) POINT Development Staff and the Board actively participate in the Program for 12 months.
- 4) Establish a formal Legacy Giving Program for The POINT (including all materials, promotional items and an implementation strategy).

• Specific needs & issues to be addressed

- 1) The POINT lacks a formal Legacy Giving Program and the staff and board lack the expertise needed to develop, implement and sustain one.
- 2) The POINT received a \$1,000,000 endowment gift and needs to begin helping it grow.

3) Fundraising is time consuming and costly. The POINT is in its 18th year of operation and traditional avenues of fundraising are losing their appeal.

- **Why it is important to fund this now**

The POINT is at a pivotal time of growth and has never had a formal Legacy Giving Program. We received an unexpected endowment gift in 2019 (\$1,000,000) which sparked the urgency of getting a Legacy Giving Program in place. We are so grateful for this gift and eager to begin building our endowment up to maximize its impact and longevity. In the past, The POINT has relied on simple website or newsletter statements to attract legacy gifts and beyond this gift, it has not been very effective. This has largely been due to lack of time, resources and expertise.

Additionally, The POINT has experienced substantial growth over the past 2 years with the completion of our facility expansion and spike in student enrollment. With this growth comes significant increases in operating expenses (utilities, staffing, etc.). The POINT has also been working to improve our care of employees over the past year by investing in healthcare benefits and professional development.

A Legacy Giving Program will help streamline efforts and automate more giving during this season of growth. While there is a big financial investment up front, it yields a significant ROI. Often times, smaller nonprofits never enter into the realm of legacy giving because they are too busy raising the budgets amount each year. A Legacy Giving Program helps take the pressure off and allows our donors to give a gift in perpetuity. Also, research suggests that once someone has given a legacy gift their annual gifts increase.

And finally, COVID-19 reduced some of our operating expenses this summer making it feasible to launch this program. However, as we prepare to re-open for students this month, additional funds are critical to help us maintain the monthly expense for this capacity project over the next year.

- **How impact & results will be demonstrated**

Increased revenue from a Legacy Giving Program will help build The POINT's endowment, ensuring long-term sustainability for the organization. Legacy gifts also enable The POINT to better plan for the future and have more certainty of our financial situation from year to year. With increased giving we also maximize our impact in the community by increasing our capacity to serve more youth, recruit more volunteers and better care for our staff.

These impacts will be demonstrated through financial statement evaluations and student impact evaluations and attendance and grade reports. Results are communicated to stakeholders via newsletters, annual reports and social media.

- ***For capacity building grant proposals:***

- ***How will this capacity building initiative impact your nonprofit?***

- 1) Short Term Impact: A clear and concise Legacy Giving Program (Materials and Implementation Strategy). Staff will feel more confident soliciting legacy gifts and constituents will be better informed of the opportunities to leave a legacy at The POINT.
- 2) Medium Impact: An increased endowment and other giving such as gifts in wills or other estate planning methods.
- 3) Long Term Impact: The POINT gets out of the cycle of constantly needing to raise money every year because we will have a dependable revenue coming in through the Legacy Giving Program.

- ***How will this impact be measured?***

Continued evaluations of Legacy Giving Revenue as well as fundraising costs to achieve them.

- ***Include a description of the expected activities; timeline & costs to implement the initiative. If external consulting services are required, include the anticipated costs & expertise of the consultants to be hired. Include external consultant proposals if applicable.***

In order to develop a Legacy Giving Program, The POINT will be working with a professional consulting company, Everyday Planned Giving, LLC (EPG). EPG is run by Lori Kranczer who has been working in the nonprofit space for 20 years, creating and running several substantial legacy program initiatives for large nonprofits.

The POINT was referred to EPG and after much research, really likes their individualized approach to legacy planning. EPG will be facilitating the 12 month program, "Lead with Legacy". The total cost for the program is \$7,800 and The POINT will make monthly payments of \$650. The POINT reviewed several local programs and has entered into a contract with EPG.

EPG's 12 Month "Lead with Legacy" program will provide The POINT with the following:

Access To Program Area – EPG shall maintain a Program Area that may include lessons, forms, worksheets, checklists, and other information. The POINT will have access to this Program Area for a period of 12 months.

Access To Private Discussion Group – EPG will maintain a Private Group that The POINT will have access to as a member of the Program. That Group provides a forum for The POINT to connect with other Program participants and to seek guidance and support. Members of the Company will seek to interact with Program participants in the group.

Q&A Sessions – As a member of the Program, The POINT will have access to biweekly question and answer sessions. The POINT is guaranteed access to a total of 26 such sessions.

One-On-One Calls With Instructors – The POINT will be entitled to 12 private calls with coaches and/or consultants working for the EPG.

Conclusion – The POINT will have a ready to launch Legacy Giving Program at the conclusion of the school year (complete with marketing materials, templates, strategy, etc.).

CAPACITY PROJECT TIMELINE

- May – August: POINT staff researched Legacy Giving Training and participated in the Planned Giving Council of Greater Philadelphia's Planned Giving Course to serve as a foundation for moving to this next step.
- August 2020: Enter into Contract with EPG
- August 2020 – December 31, 2020: Secure funding for Lead with Legacy Program in 2021.
- September 2020 – August 2021: POINT staff and Board participate in the Lead with Legacy Program
- January 2021: POINT launches Legacy Giving Program

III. ATTACHMENTS

E-mail or mail this support information

1. Copy of 501 (c) (3) federal tax-exempt letter (See attached).
2. List of Board of Directors, with their affiliations (See attached).
3. Most recent annual report & financial statement, audited if available (See attached).
4. Itemized organizational operating budget with actual results for prior fiscal year & current fiscal year to date (See attached).
5. If capacity building initiative, itemized budget - including external consultant's proposal, if applicable (See attached).
6. Current strategic plan. If your nonprofit does not have a current strategic plan, explain why (See attached).