

GRANT PROPOSAL GUIDELINES

- We **connect people who care with causes that matter, so their philanthropy makes a difference now & forever.**
- We are a **collection of Field of Interest & Donor Advised Funds** with **@\$3.5M granted annually** to nonprofits in Chester County & beyond.
- **99%** of our grants are made by our generous Fund Advisors, who make grant decisions all year.

Proposals submitted by nonprofits are considered for 2 types of grants:

Field of Interest & Donor Advised Funds (No Deadline)

- ◇ Grants **focus on Chester County** causes & issues, but are not limited to Chester County.
- ◇ Charitable nonprofits working **in all fields of interest** are considered for grant awards. (I.e. arts, culture, & humanities; education; community improvement; environment; religion; health; & human services)
- ◇ **General operating** grants are encouraged. Nonprofits should be specific about their mission, goals, & measurable outcomes.
- ◇ Proposals can be submitted **anytime all year.**
- ◇ Grant decisions are made **intermittently** all year, as Fund Advisors desire.
- ◇ Grant **awards** typically range from **\$500-\$7,500.**

Fund for Chester County Capacity Building Grants (Due 9/15)

- ◇ For eligibility in this grant program, nonprofits must be **located in & serve Chester County.** NPO's with budgets of \$500,000 or less are given preference.
- ◇ The goal of capacity building grantmaking is to **strengthen the effectiveness of NPO's serving the Chester County region,** in areas including:
 - Mission, Vision & Strategy
 - Governance & Leadership
 - Partnerships & Collaborations
 - Operations & Technology
 - Fundraising, Development & Marketing
- ◇ Proposals must be submitted by **September 15** to be eligible for consideration.
- ◇ Grant **awards** typically range from **\$500-\$5,000,** with monies distributed by **February.**

- Use this form @ www.chescocf.org to apply online for grants from all Community Foundation Funds.
- **Email proposals to grants@chescocf.org**
- Proposals are considered "complete" when CCCF has **confirmed** receipt of the **Grant Proposal Summary Sheet, Narrative & Attachments.**
- Proposals are shared electronically and online with Fund Advisors, Donors & Grant Panels.
- Per IRS Regulations, applicants **must be** charitable, tax exempt organizations with 501(c)(3) certification & **cannot** be individuals.

Please contact Grants Administrator **Kevin Baffa** at **(610)-698-8211** or grants@chescocf.org with any questions.

I. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL SUMMARY SHEET

Date 9/8/21

Contact Information

Organization Name: Oxford Area Historical Association
Address: 140-142 Locust Street, PO Box 355, Oxford PA
Phone: 610-932-3625
Website: <https://oxfordhistorical.org>
Year Incorporated: 2000
FEIN: 23-30445756

ED/CEO Name: N/A (volunteer board-run)
ED/CEO E-mail: N/A
Board Chair Name: Gail Roberts
Board Chair Approval: Yes
Primary Contact Name: Gail Roberts
Primary Contact E-mail: gailrobrts@aol.com

Organization Information:

Field/s of Interest:

Arts, Culture & Humanities Environment/Animal Welfare Education
 Health Human Services Religion

Mission: The mission of the Oxford Area Historical Association is to preserve and promote the historical significance of the Oxford area, educate the community on historical interests, and to encourage the economic vitality of the Oxford area through historic preservation.

Geographic Area Served (If not all of Chester County, specify primary Chester County regions served):

Oxford, PA, and the surrounding townships in Southern Chester County

Describe Population Served & Annual Number of People Served:

The Oxford Area Historical Association (OAHA) is located in downtown Oxford, PA, and serves everyone in the Borough and the surrounding Townships. In the Oxford area, US Census data from 2018 showed a 16.1% rate of poverty, and 46.4% of the Oxford Area School District's students qualify for the federal free/reduced lunch program. Average income in Oxford is \$38,125. On average, OAHA serves 705 people per year through our programs and archives access.

Annual Budget \$ <u>\$34,500</u>	<u>0</u>	# of Full-Time Equivalent Paid Staff
<u>88</u> % of budget for program expenses	<u>8</u>	# of Board Volunteers
<u>6</u> % of budget for administrative expenses	<u>6</u>	# of Active Non-Board Volunteers
<u>6</u> % of budget for fundraising expenses	<u>1555</u>	# of Volunteer Hours

100 % total

Top 3-5 funding sources: Individual donors (no donors over \$500), program sponsors, book sales

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: \$ 19,500

Proposal Summary: OAHA is seeking a capacity-building grant to hire a temporary, part-time, contract interim executive director to help to prepare us for future sustainability and hiring of permanent staff

II. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

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

OAHA, which was founded in 2000, is a local group of volunteers and members whose mission is to preserve and promote the historical significance of the Oxford Area. We present monthly programs on a variety of historical topics, record oral histories of long time Oxford residents, and have organized walking tours, co-sponsored reenactor programs in the school district, and arranged trips to historical sites. In 2014, an Archives Committee was created to acquire, process and house documents and objects related to the history of the Oxford Area. Our Archives Collection is now housed at 140-142 Locust St. in downtown Oxford. We are currently renting two climate-controlled storage units because the space in our present location is too small to house our growing collection of historical objects and archives. While we look forward to expanding in the future, right now we are simply concerned with keeping our collections safely housed and staying viable, so that we can make sure OAHA is here to preserve and promote the historical significance of the Oxford area.

The work of the Archives Committee augments OAHA's other activities. The organization presents monthly programs on a variety of historical topics that are usually related in some way to local history. Programs on Sunset Park, the history of the local fire company, and the story of the Navajo Code Talkers during World War II all attracted large crowds during the last few years. These programs are growing in popularity. On average, OAHA serves 705 people per year through our programs and archives access. However, during COVID, we pivoted to online programming, and roughly 1600 viewers attended our virtual programs. OAHA has partnered with the Oxford Educational Foundation and the Oxford Area School District to provide re-enactor programs in the schools. The school district has agreed to place some of its archives on loan to OAHA.

An all-volunteer board oversees and implements all of OAHA's programs and activities. The board is struggling with finding new members, still reeling from the impacts of the COVID-19 crisis on the organization, and feel that we need to seek outside help in order to stabilize and grow.

2. Funding request

OAHA is seeking a capacity-building grant to hire a temporary, part-time, contract interim executive director to help to prepare us for future sustainability and hiring of permanent staff. We are aware there is a limit of \$5,000 for capacity building funding from CCCF, but we are hoping we might be able to supplement that through utilizing this as a general request to CCCF's donor-advised funds.

A. How will this capacity building initiative impact your nonprofit?

OAHA is at a crossroads in our evolution as a nonprofit. Our board knows that we need to grow in order to survive, but feels like we need help in order to do so. Rather than seeking to hire a permanent executive director right away, we feel as if we should put some things in place first. A skilled interim executive director can help nonprofits to emerge stronger, more fiscally sound, and with higher levels of optimism. They can lay the groundwork for the next leader's success by managing the day-to-day operations, by examining the organization objectively, keeping finances and revenue generation on track, helping the board clarify its vision and future leadership needs, and mentoring the new executive once appointed. OAHA has an existing relationship with a local nonprofit consultant, Krystine Sipple, and would like for her to serve in this capacity.

B. How will this impact be measured?

The board recently completed a strategic planning process, during which we determined that we should start thinking about hiring our first paid staff person. During that though process, the board came up with a list of goals for an interim executive director. We will consider the interim executive director project a success if we can add new members to the board, strengthen how the board operates, and successfully hire a permanent part-time executive director to lead the organization.

C. Description of the expected activities; timeline & costs to implement the initiative.

Description: As the interim executive director, Krystine will provide customized leadership, board development, and organizational development services to the Oxford Area Historical Association which could include, but not be limited to, the following:

- Fulfill all the regular duties of a nonprofit chief executive, including working with the board, providing fiscal oversight, etc.
- Support and guide the board in building the board and committees.
- Create job descriptions for officers and committees.
- Recruit members for an exploratory committee to look at expansion options, run the meetings for the term of this contract.
- Work with board to craft appeal for help letter to go to community members.
- Work with board to complete plan for the achievement of Strategic Plan goals
- Develop and implement public relations plan for outreach to key community leaders and partners to build relationships and demonstrate capacity for managing change.
- Review and recommend updated financial policies and work with treasurer to review current procedures.
- Review and evaluate all current fund development efforts and suggest other options.
- Review by-laws and suggest changes, create organizational structure.
- Ensure board members are trained in nonprofit governance roles /responsibilities
- Set up the organization with a payroll company.
- With the board, create a job description and seek candidates and funding for a permanent executive director.
- Report hours worked and progress made weekly.

Expertise of consultant: Krystine (Krys) Sipple has over twenty-five years of experience in the nonprofit sector. Her expertise is with creating development programs and governance infrastructures for small, grassroots non-profit organizations. She has worked extensively with non-profit boards to move them from the early stages of hands-on staff support to the mature stages of governance and fundraising for their organizations. She recently served for two years as the interim executive director of Oxford Area Neighborhood Services Center. Through that experience, she became familiar with the culture of and trusted by the people of Oxford, which will be of great help to OAHA if she is able to serve as the interim executive director of our organization.

She has worked in senior living, health care and education, and currently runs her own nonprofit consulting firm. She is a graduate of Virginia Wesleyan College with a BA in Psychology, a Graduate of the Chester County Leadership Connection, and holds a MS in Nonprofit Leadership from LaSalle University. Krys holds a Certified Fundraising Executive (CFRE) designation, is a Master Teacher as designated by the Association of Fundraising Professionals (AFP) and is a registered fundraising counsel.

She is a C4 consultant for the Chester County Community Foundation and teaches throughout the region. She is also a columnist for Generocity, a Philadelphia-based social impact news and events group with a mission of building better communities through stronger impact.

She is on the board of Barclay Friends, a senior living community in West Chester, PA, serves as the governance chair of the Philadelphia Folksong Society board, and is the Development chair for the Longwood Rotary Club. In the past, she has served on the national grants selection committee for the American Medical Association Foundation in Chicago, the board of AFP's Greater Philadelphia Chapter, as secretary of the Health Care Access Board in Phoenixville, Foundation Chair of the Phoenixville Rotary Board, Membership Chair for the Oxford Rotary Club, and on the Board of the National Association of Free and Charitable Clinics. www.krystinesipple.org

Timeline: Six-month contract, 10 hours per week for 26 weeks, to begin when funding is procured.

Cost: For the duration of this contract, Krystine will discount her normal hourly rate of \$150 to \$75. Out of pocket expenses, should they arise, will be billed at cost, excluding mileage. OAHA will be invoiced monthly, with the six-month total not to exceed \$19,500.

III. ATTACHMENTS

E-mail or mail this support information

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

- Use this form @ www.chescof.org to apply online for grants from all Community Foundation Funds.
- **Email proposals to grants@chescof.org**
- Proposals are considered "complete" when CCCF has **confirmed** receipt of the **Grant Proposal Summary Sheet, Narrative & Attachments**.
- Proposals are shared electronically and online with Fund Advisors, Donors & Grant Panels.
- Per IRS Regulations, applicants **must be** charitable, tax exempt organizations with 501(c)(3) certification & **cannot** be individuals.

Please contact Grants Administrator Kevin Baffa at (610) 696-8211 grants@chescof.org with questions.



WHAT IS CAPACITY BUILDING?

Capacity building helps bring a nonprofit to the next level of operational, programmatic, financial, or organizational maturity, in order to more effectively & efficiently fulfill its mission.

Capacity building may include (but is not limited to) projects which address:

- **MISSION, VISION & STRATEGY**
Organizational Assessment - Strategic Planning - Financial Planning
- **GOVERNANCE & LEADERSHIP**
Board Development - Executive Transition/Succession Planning - Leadership Development - Staff Training & Professional Development
- **PARTNERSHIPS & COLLABORATIONS**
Coalition Building – Collaboration - Mergers & Acquisitions - Strategic Restructuring
- **RESOURCE DEVELOPMENT & MARKETING**
Major Gift Donor Identification, Cultivation, Development & Stewardship - Development Campaigns (Annual, Capital, Planned Giving) - Earned Income Development - Social Enterprise Feasibility & Development - Marketing, Branding & Communications
- **TECHNOLOGY & OPERATIONS**
Business Continuity Planning - Financial Management - Human Resources - Volunteer Management - Industry Certification - Risk Management - Technology Improvements