

I. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL SUMMARY SHEET

One page only. This page will be shared electronically with Grant Panel Members & Fund Advisors.

Note: If Philanthropy Network's Common Grant Application is used, CCCF's **Summary Sheet MUST accompany application.**

To obtain an electronic version of this application, visit www.chescocf.org

Date Sept. 14, 2022

Contact Information

Organization Name: Marshallton Conservation Trust
Address: 1302 West Strasburg Rd.
West Chester, PA 19382

ED/CEO Name: N/A
ED/CEO E-mail: N/A

Phone: 484-888-0653

Board Chair Name: Robert Portnoy

Website: www.marshalltonconservationtrust.org

Board Chair Approval (check here):

Year Incorporated: 2009

Primary Contact Name: Robert Portnoy

FEIN: 26-4117751

Primary Contact E-mail: bobportnoy2003@verizon.net

Organization Information:

Field/s of Interest:

Arts, Culture & Humanities

Environment/Animal Welfare

Education

Health

Human Services

Religion

Mission:

The Marshallton Conservation Trust (MCT) promotes the preservation and improvement of the Marshallton community through initiatives focused on maintaining and improving its livability and distinctive character.

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

All of Chester County, especially West Bradford Township and adjoining areas, and visitors to the area.

Describe Population Served & Annual Number of People Served:

Residents of Chester County (534,413), West Bradford Township (13,123), and visitors to the area.

<u>Annual Budget</u> \$ <u>66,485.00</u>	<u>0</u> # of Full-Time Equivalent Paid Staff
<u>78</u> % of budget for program expenses	<u>11</u> # of Board Volunteers
<u>19</u> % of budget for administrative expenses	<u>15</u> # of Active Non-Board Volunteers
<u>3</u> % of budget for fundraising expenses	<u>800</u> # of Volunteer Hours

100 % total

Top 3-5 funding sources: Individual donations from Board and community members

1. Board Donations
2. Community Members
3. Marshallton Triathlon (event)

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: \$ 4,000

Proposal Summary:

MCT seeks \$4,000 of a \$5,000 total to work with Krys Sipple, Principle with RD Strategies, to lead an organizational planning process in 2023 to lay the foundation for a strategic planning process in 2024.

II. CHESTER COUNTY COMMUNITY FOUNDATION GRANT PROPOSAL NARRATIVE

Provide clear, concise information. 3 pages maximum.

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

The Marshallton Conservation Trust (MCT) is a 501(c)3 non-profit corporation formed in 2009 to promote the preservation and improvement of the Marshallton community through initiatives focused on maintaining and enhancing its livability and distinctive character. MCT has no paid staff and is operated entirely by volunteers.

Marshallton is an unincorporated village and federally recognized Historic District in West Bradford Township, Chester County, Pennsylvania, United States added to the National Register of Historic Places in 1986. The Marshallton Historic District encompasses 65 contributing buildings and 3 contributing sites including the separately listed Marshallton* Inn, Bradford Friends Meetinghouse, and Humphry Marshall House. The village is recognized for its history as 1) a place that played an important role in the Battle of the Brandywine during the Revolutionary War, 2) a hub of commerce and small industry during the 19th century, and 3) home of Humphry Marshall, a noted early American botanist considered the father of American dendrology for whom the village is named.

Today Marshallton serves as the center of activity and community for the largely rural West Bradford township. Through collaborations between community organizations including MCT, West Bradford Township, West Bradford Fire Company, Bradford Friends Meeting, and Friends of Martin's Tavern, the village hosts a series of annual events that attract visitors from outside the area as well as local residents. These include strolling Christmas Carolers, Christmas Carol Sing, Memorial Day Parade, and Fall Fest. MCT serves as the organizing body for two community events –

- The annual Marshallton* Triathlon, now in its 48th year, is one of the oldest triathlons in the country. Proceeds benefit the West Bradford Fire Company and MCT.
- The annual Marshallton Memorial Day Parade. In addition to residents, people who no longer live in the area return every year for this community event.

MCT's major work is collaborating with preservation partners including West Bradford Township and Natural Lands to protect the village of Marshallton and surrounding natural land and farmland from development that would negatively impact the community. Through this means MCT has been involved with successful efforts to conserve 222 acres of open space in the surrounding area.

Most recently (August 2022), MCT was instrumental in helping secure a conservation easement on the remaining 113 acres of pastureland at Castle Rock Farm, once known as "Derbydown", the birthplace of Humphry Marshall for whom the village is named. MCT served as a local sponsoring organization which helped obtain other public funding and contributed for this transaction. Earlier in 2022 MCT served as an organizing voice for residents of West Bradford Township to express their concerns about the development of 65 acres of a property known as Tarad Hill with the result that West Bradford Township reached an agreement with the owner to place the acreage under conservation easement.

*Historically there are two different spellings of Marshallton/Marshalton arising out of a deed transfer error. Each spelling continues to be used today by various community entities.

In 2021 MCT successfully urged PennDot to perform a Traffic Safety Study for roads that enter and exit Marshallton with the result that vehicles travelling through the village are limited to 25-foot total length. It also began planning for the Humphrey Marshall Memorial Garden to commemorate the famous American naturalist who lived in Marshallton and for whom the village is named.

In 2017 MCT was instrumental in advocating for the adoption of the West Bradford Open Space Referendum which maintains the integrity of the village into the future by protecting its boundaries. MCT was also involved in the development of West Bradford Township's new Comprehensive Plan for which MCT successfully advocated for the adoption of a new section in the Plan to address the specific principles required to ensure preservation of the village.

Two MCT board members serve on the West Bradford Township Land Preservation and Sustainability Committee which has developed a new Open Space Plan for West Bradford Township. One Board member is also a member of the Township's Historical Commission, which works to preserve and promote the history of the village of Marshallton and the Township of West Bradford.

MCT frequently collaborates with other community organizations. In 2020-21 MCT worked with the West Bradford Historical Commission and Friends of Martin's Tavern to complete the [Marshallton Oral History Project](#) so current and future generations may learn what Marshallton was like many decades ago from people who experienced it first-hand.

2. Funding request

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

As a grassroots, all-volunteer community organization formed in 2009, MCT was able to function effectively without a consultant-led strategic planning process or strategic plan for its first fifteen years. During this time, the Board engaged in several half-day retreats led by Board Chair Robert Portnoy that allowed MCT to define its role, address conservation and community issues as they arose, and provide an organizing body for community events such as the Memorial Day Parade and Marshallton Triathlon.

At this point in its organizational life cycle, MCT understands it is vital to engage in a Strategic Planning Process to increase its impact, meet its goals, and plan for organizational sustainability. At this time, however, significant board transitions are underway or anticipated within the coming year – the current Board Chair, Robert Portnoy, who has served on the MCT board since the organization's founding and as Chair since 2016, is planning to step down in one year - effective December 31, 2023; several long-serving members are unable to continue upon the conclusion of their current terms; and several new members have recently joined (three in July 2022). Because of these transitions, the board recognizes that a strategic planning process will be most effective when the new Board Chair and officers are in place. It should be noted that the Board Chair, officers, and committees conduct the work that in other organizations would be assumed by a paid executive director and staff. Therefore, at this time, we are seeking funds from the Chester County Community Foundation to engage in the preliminary step of an organizational planning process that will include Succession Planning, Board Training, and Board Member Onboarding in 2023. This work will build on current strengths to strategically assist the organization prepare for future sustainability and growth, and lay a firm foundation for MCT to conduct a strategic planning process in 2024 that serves the organization and Marshallton/West Bradford community most effectively.

- *How will this impact be measured?*

The impact of MCT engaging in an Organizational Planning Process in 2023 prior to a Strategic Planning Process in 2024 will be measured as successful upon completion of the following –

Succession Planning

- Job descriptions for all board officer positions
- Written succession plans for all officer positions
- Written leadership emergency transition plan, which will include an outline for a “substitute manual.”
- Identification of a new Board Chair, and additional officers as needed

Board Training

One 4-hour retreat for the entire board regarding the board roles and responsibilities, also incorporating an overall look at the future strategic direction of the organization.

Board Member Onboarding

- Board skills matrix
 - Job description for board members with signature page
 - Annual signature forms for board members (COI and Confidentiality)
 - Annual evaluation procedure for board members
 - Board onboarding checklist.
- *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.*

MCT plans to engage the services of Krys Sipple, principal with [RD Strategies LLC](#) with expertise in assisting small nonprofits, to lead the MCT Board in an organizational planning process at a mutually agreed upon 3-month period between January - August 2023 (full proposal from Krys Sipple/RD Strategies LLC attached). The process and include

- 1) Succession planning for the board chair and other officer roles,
- 2) One 4-hour training session on board roles and responsibilities, and
- 3) Plan for board recruitment and onboarding.

The costs to implement this initiative are as follows –

Succession Planning	\$2,500
Board Training	\$1,500
Board Member Onboarding	\$2,000
Total	\$6,000
Courtesy discount	-\$1,000
Revised Total	\$5,000

A full proposal from Krys Sipple/RD Strategies LLC and Krys Sipple’s bio are included with our application materials.