Common Grant Application
& Common Report Form

Version 3.1 (January 2010)

> These forms were developed by Philanthropy Network Greater Philadelphia (formerly Delaware Valley Grantmakers) with foundation and nonprofit professionals to streamline the grantwriting process. Please note that Philanthropy Network DOES NOT MAKE GRANTS; applications must be submitted directly to the individual grantmakers from whom you are seeking funding.

Philanthropy Network's Common Grant Application is designed to be used in one of two ways; applicants may choose to fill in the form exactly as presented or may opt to use it as a basic template to organize thoughts and consider strategies. Included is a list of those grantmakers who accept this form as a complete application.

Before completing the common grant application, be sure to:
- Read all instructions thoroughly before beginning.
- Research and communicate with funders – obtain a copy of funding guidelines, deadlines and/or annual report. Be aware of each funder's preferred method of initial contact, and additional information required.
- Be strategic – make sure your goals, objectives and amount requested match the criteria of the funder you are approaching. Tailor your application to meet each funder's specifications.

TABLE OF CONTENTS

Common Grant Application
COVER SHEET

Remember to check each funding organization's website for guidelines, funding priorities and deadlines.

NAME OF ORGANIZATION

Legal Name (as designated on 501c3)
(if different than above)

Address:

Phone: _____ Fax: _____

E-mail: _____ Website: _____

Executive Director:

Current Board President:

Primary Contact: _____ Title: _____
(if different than above)

Phone: _____ E-Mail: _____
(if different than above)

IRS 501(c)(3) Nonprofit?
❑ **Yes** (Please attach IRS designation letter)
❑ **No** (Please attach written agreement from the fiscal agent)

Federal ID #

Type of Grant Requested:
❑ Capital ❑ Capacity Building
❑ General Operating Support ❑ Other: _____
❑ Program/Project

Name of Program/Project/Campaign:

Amount Requested: _____ **Application Deadline:** _____
(if applicable)

Total Program/Project Budget: _____ **Duration of grant requested:** _____

Total Organizational Budget for 1 year: _____ **Fiscal Year End**: _____

State your organization's mission:

Summarize the proposal and how it fits with the funder's mission and grantmaking priorities:

Have you previously applied to this organization?
- ❏ Yes
- ❏ No

Is this request being submitted exclusively to this funder?
- ❏ Yes
- ❏ No

List of three largest funders in the last fiscal year and grant amount.

1. Funder _____   Grant Amount _____

2. Funder _____   Grant Amount _____

3. Funder _____   Grant Amount _____

List the proposal's target population, constituents, and geographic communities:

AGREEMENT

I certify, to the best of my knowledge, that all information included in this proposal is correct. The tax-exempt status of this organization is still in effect. If a grant is awarded to this organization, the proceeds of that grant will not be distributed or used to benefit any organization or individual supporting or engaged in unlawful activities.

_____   _____
Signature of Executive Director   Date

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402 | Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

3

The following outline is a guide. Use the format as appropriate for your organization's request. Be succinct and clear. Proposal Narrative should be <u>three pages</u> maximum, and should provide the funder with the information listed below <u>in this order</u>:

Organizational Background and Information:

➢ Give a brief summary of your organization's history
➢ Describe your current programs, activities, service statistics – highlighting the past year – and cite how your programs fulfill the mission. Identify three of your organization's greatest successes; what are your greatest challenges?
➢ If applying for general operating support, list your organization's overall goals & objectives

Purpose of Grant:

➢ **For General Operating Support Requests:**
  ▪ Describe how the request will enhance organizational capacity, sustainability and/or the achievement of measurable results for the organization
  ▪ Describe how your organization assesses/evaluates its programs and cite examples of how you have applied the learnings from your evaluation.

➢ **For Specific Project or Program Requests:**
  ▪ Identify the issue or need to be addressed, providing evidence of size and/or severity. If applicable, provide demographic and geographic information regarding the community or population benefiting from or served by the request.
  ▪ Explain your goals and objectives for this grant
    o How do you plan to accomplish your goals?
    o How will you measure the impact of the project?
    o Who will be responsible and what is their experience carrying out this project?
    o What is the anticipated timeline for implementing the request?
    o What are the challenges you anticipate during this program/project?
    o What will you do if you receive less or more funding than the desired amount? How will that change the project?
    o How will the results be publicized and communicated?

➢ **For Capital Campaign Requests Only:**
  ▪ Requests are designated for construction, renovation or improvement of a property
  ▪ Provide a case statement for the capital project, including a feasibility study and/or assumptions for the project.

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

4

- If the request is for planning, describe why this project is important now – how does it fit in to the overall planning process, what will you learn and how will it inform the next stage of the capital project?
- If you plan on hiring a consultant, how did you select the consultant? What are his/her qualifications to perform the work?
- If you have not yet selected the consultant how did you arrive at the project cost?
- Do you own or lease the property? If you lease, how long is your lease?
- What is the total cost of the project (include hard and soft costs) – how were these costs developed?
- How do you intend to pay for this project?
- Have you completed a facility project before? How long ago? How was it funded
- Describe plans for funding and ongoing maintenance of new capital project
- Identify board's participation in the campaign, prospects and naming opportunities

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

5

NOTE: This format is optional and can serve as a guide to budgeting. If you already prepare project budgets that contain this information, you may submit them in their original forms. Attach a narrative explaining the budget, if necessary.

PROGRAM/PROJECT INCOME

Fiscal Year: _____

CONTRIBUTIONS	COMMITTED	PENDING	DECISION DATE
Government grants	$		
Foundations	$		
Corporations	$		
United Way	$		
Individual contributions	$		
	$		
	$		
	$		
Other	$		
Subtotal Contributions	$		
EARNED INCOME			
Government contracts	$		
Fee for Service	$		
	$		
Fundraising events and products	$		
Membership income	$		
In-Kind Support	$		
Investment income	$		
Other (specify)	$		
Subtotal Earned Income	$		
TOTAL **(Contributed plus Earned)**	**$**		

Note: Pending sources of support include those requests currently under consideration. Please indicate anticipated decision date if known.

IDENTIFY COMMITTED AND PENDING SOURCES FOR THIS PROJECT			
SOURCE	AMOUNT COMMITTED	AMOUNT PENDING	DECISION DATE
1.			
2.			
3.			
4.			
5.			

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

6

PROGRAM/PROJECT EXPENSES

Item **(allocate all indirect expenses in your project budget)**	<u>Amount</u>	<u>% FT/PT</u>
Salaries and wages (break down by individual position and indicate full or part-time)	$	
	$	
	$	
	$	
	$	
	$	
	$	
SUBTOTAL		
Insurance, benefits and other related taxes	$	
Consultants and professional fees	$	
Travel	$	
Equipment	$	
Supplies	$	
Printing and copying	$	
Telephone and fax	$	
Postage and delivery	$	
Rent and utilities	$	
In-kind expenses	$	
Depreciation	$	
Other (specify)	$	
	$	
	$	
TOTAL EXPENSES	$	
Surplus/Deficit (Income less Expense)	$	

This format is optional and can serve as a guide to budgeting. If you already prepare an organization budget that contains this information, you may submit it in its original forms. Attach a narrative explaining the budget, if necessary.

REVENUES   FISCAL YEAR: _____   Number FTEs _____

(Number Full Time Equivalents (1 FT=1; 2PT = 1 etc.)

Source	**Amount**
Contributed Support	
Government grants	$
Foundations	$
Corporations	$
United Way or other federated campaigns	$
Individual contributions	$
	$
Total Contributed Support	$
Earned	
Government contracts	$
Earned income	$
Fundraising events and products	$
Membership income	$
In-kind support	$
Investment Income	$
Other (specify)	$
Total Earned	$
TOTAL REVENUES	**$**

ORGANIZATIONAL EXPENSES   FISCAL YEAR: _____

Item	**Amount**
Salaries, wages and benefits	$
Insurance and/or other taxes	$
Consultants and professional fees	$
Travel	$
Equipment	$
Supplies	$
Printing and copying	$
Telephone and fax	$
Postage and delivery	$
Rent and utilities	$
In-kind expenses	$
Depreciation	$
Other (specify)	$
TOTAL EXPENSES	**$**
Difference (Income less Expense)	**$**

A Capital Campaign Budget should include the following information:

SOFT COSTS

Planning
Includes real estate and design consultants, feasibility studies, staff time dedicated to project management

Capital Campaign Expenses
Consulting fees, feasibility study, donor recognition, special events, collateral material, campaign software, etc.

Project Financing Costs
Appraisals, interest, environmental audits, application fees, points, legal fees, bond fees, mortgage recording taxes, title insurance

Project Acquisition and construction
Includes taxes, assessments, fees and permits, legal fees, appraisal

Design
Project management, architects and engineers fees, permits, filing fees

Construction
Project management

Other
"swing" or interim space; moving costs, foregone revenue during "down" time, FF&E

HARD COSTS

Site Acquisition
Construction or renovation
This list is typical of the categories specified by the architect when developing the construction cost estimate;
The term "hard costs" often is referred to as "bricks and mortar"; and excludes technical assistance, consulting fees, etc, those are all classified as "soft costs"

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

9

The following attachments are required:

✓ Grant Proposal Narrative

✓ Organizational Budget for the most recently completed fiscal year

✓ Current Profit & Loss Statement

✓ Itemized budget for how this grant will be used. Identify the amounts & sources of revenue; note which sources are committed or pending.

✓ Organization's most recent AUDITED statement, if budget is greater than $100,000.
   o Include Form 990 if budget is between $25,000 and $100,000.
   o Include unaudited form if neither document is available.

✓ Latest Annual Report or Summary of Organization's Activities in the past year.

✓ Current List of Board Members and their affiliations.

✓ One-paragraph descriptions of key staff and their relevant qualifications.

✓ Letters of Agreement from any collaborating agencies, if applicable.

✓ IRS Determination Letter or written agreement from Fiscal Agent.

Optional:

✓ Letters of support, recent newspaper/magazine articles. Please use discretion in limiting additional attachments.

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

10

Be sure your application includes:

☐ A brief introductory cover letter on organization's letterhead

☐ A completed Common Grant Application Cover Sheet with contact information

☐ A copy of the IRS letter confirming your organization's 501(c)(3) status

☐ A completed Grant Proposal Narrative not exceeding three (3) typed pages (excluding attachments)

☐ An itemized annual budget for your organization's current fiscal year, with actual figures for the previous fiscal year

☐ An itemized budget, listing income and expenses, for this specific grant

☐ Your organization's most recent AUDITED financial statement or IRS Form 990

☐ Your organization's latest annual report or summary of the prior year's activities?

☐ Current Board list and affiliations

☐ One-paragraph descriptions of key staff and their relevant qualifications

☐ Grantee report (if previously funded)

☐ Letters of agreement from any collaborating agencies (if applicable), and letters of support and/or recent reviews or articles (if available)

> **If you have questions regarding specific information to be included with your application, please contact the individual funder(s) to whom you are applying.**

IMPORTANT: Please check with EACH GRANTMAKER
for funding guidelines, proposal deadlines, and any other required material.

List Updated October 2018

Grantmaker	Phone	Email	Accept CRF?	Website
1675 Foundation	610/896-3868	drowe@1675foundation.org	No	www.1675foundation.org
Brandywine Health Fdn.	610/380-9080	info@brandywinefoundation.org	Yes	www.brandywinefoundation.org
Chester County Community Foundation	610/696-8211	Grants@chescocf.org	Yes	www.chescocf.org
Connelly Foundation	610/834-3222	info@connellyfdn.org	No	www.connellyfdn.org
Dolfinger-McMahon Fdn.	215/979-1768	renz@duanemorris.com	Yes	n/a
Samuel S. Fels Fund	215/731-9455	sarah@samfels.org	Yes	www.samfels.org
Foundations Community Partnership	267/247-5584	rbernstein@fcpartnership.org	No	www.fcpartnership.org/
Green Tree Community Health Foundation	215/438-8102	bethany@greentreecommunityhealth.org	Yes	www.greentreecommunityhealth.org
The Grundy Foundation	215/788-5460	ejw@grundyfoundation.com	Yes	www.grundyfoundation.com/
IBM Corporation	610/578-2258	dmelley@us.ibm.com	No	www.ibm.com/ibm/ibmgives/
Lancaster Osteopathic Health Foundation	717/397-8722	info@lohfoundation.org	No	www.lancasterosteopathichealthfoundation.org/
The Lenfest Foundation	610/828-4510	lenfestfoundation@lenfestfoundation.org	Yes	www.lenfestfoundation.org
McLean Contributionship	610/527-6330 x1	SandraLMcL@aol.com	Yes	www.fdncenter.org/grantmaker/mclean
The New Century Trust	215/735-7593	newcenturytrust@verizon.net	Yes	n/a
Rosenlund Family Fdn.	Unlisted	Dalemitch1@verizon.net	Yes	www.rosenlundfamilyfoundation.org
St. Christopher's Foundation for Children	267/568-1126	jss@scfchildren.org	Yes	www.scfchildren.org
Thomas Scattergood Behavioral Health Fdn.	215/831-3000	info@scattergoodfoundation.org	Yes	www.scattergoodfoundation.org
Subaru of America Foundation, Inc.	856/488-5099	foundation@subaru.com	Yes	www.subaru.com
Union Benevolent Association	215/763-7670	info@uba1831.org	Yes	www.uba1831.org

12

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

IMPORTANT POINTS
- **Every funder has different report deadlines and timetables**
- **Before submitting this format, confirm with funder that it will be accepted**
- **Funders may also request additional information at any stage of the reporting process**

Grant Number: (if applicable) _____ Date Grant Received: _____

Amount Granted: _____ Grant Period _____/_____ to _____/_____

ORGANIZATION NAME: _____

Address: _____

_____

Name of Executive Director:_____

Name of Contact Person:_____
(if different than above)

Telephone: _____ Fax: _____ E-mail: _____

Project Name (if applicable):

Type of Grant Received:
- ❑ Capital
- ❑ General Operating Expenses
- ❑ Program/Project

- ❑ Capacity Building
- ❑ Other:_____

_____ _____   _____

Signature of Executive Director   Date

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

13

Grant Reporting Narrative

Results
- List the original goals and objectives of this grant. Were these goals met? What impact did this grant have on your organization, community and the specific population served?
- In what ways did the actual project vary from your initial project plans?
- If applicable, attach selected material related to the funded project: press or news items, brochures, letter of support, photographs, etc.

Lessons Learned
- What are the most significant results gained from this project, both relative to your organization and the audience you serve?
- What are the most important lessons your organization has learned from this project?
- If you were to undertake this project again, what would you do differently?

Financials
- Using the original budget included with your proposal, provide an itemized budget of actual expenses and income for the project. Provide narrative on any variances of 10% or greater from the original project budget.
- Include a detailed, complete accounting of how the specific grant dollars from this grantmaker were spent, including a project financial statement if appropriate.
- Who else has funded this project, and at what level?

<u>GRANTMAKERS WHO ACCEPT THIS REPORT FORM *</u>

Brandywine Health Foundation
- ✓ Chester County Community Foundation
- ✓ Connelly Foundation
- ✓ Dolfinger-McMahon Foundation
- ✓ Samuel S. Fels Fund
- ✓ Green Tree Community Health Foundation
- ✓ The Grundy Foundation
- ✓ The Lenfest Foundation

- ✓ McLean Contributionship
- ✓ The New Century Trust
- ✓ Rosenlund Family Foundation
- ✓ St. Christopher's Foundation for Children
- ✓ Thomas Scattergood Behavioral Health Fdn.
- ✓ Subaru of America Foundation, Inc.
- ✓ Union Benevolent Association

See page 12 for contact information.

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

14

Use these tips…

Communicate with funders. Contact *each funder* to obtain a copy of funding guidelines and deadlines. Be aware of individual funder's preferred method of initial contact *(some prefer a letter of inquiry (LOI) prior to receiving a full application)*, as well as the number of copies of the application you should submit.

Be strategic. Make sure that your goals, objectives and amount requested match the criteria of the funder.

Follow the directions. Write clearly and follow the format of the application closely.

Be through. Do not skip questions unless they in no way apply to your request. Avoid repetition of ideas.

Be concise, yet informative in your proposal. Many funders have a scoring system that weighs heavily on the proposal. Writing a clean, understandable narrative is key.

Cover letter. It is customary to provide a cover letter on your organization's letterhead, signed by the Executive Director or Chair of the Board.

Glossary of Terms

Types of Grants:
Capital Grant: *Funding for endowment, construction, or equipment.*
General Operating Support: *Funding for the general purpose or work of an organization, including personnel, administration, and other expenses for an existing program.*
Project/Program Grant: *Funding for a specific initiative or new endeavor.*
Capacity Building Grant: *Funding specifically to enhance organizational capacity and address important issues of organizational development and effectiveness (e.g. strategic planning, leadership development, technology infrastructure, etc.).*
Letter of Inquiry (LOI): *Many foundations ask potential grant recipients to first submit a brief letter of inquiry before receiving an invitation to submit a full proposal. Check with each individual funder.*

HELPFUL RESOURCES

- **Regional Foundation Center** at the Free Library of Philadelphia: 215/686-5423 or http://libwww.freelibrary.org/rfc/
- **The Nonprofit Center at LaSalle University**: 215/951-1701 or www.lasallenonprofitcenter.org
- **Pennsylvania Association of Nonprofit Organizations**: 717/236-8584 or www.pano.org
- **StrongNonprofits.org** – Nonprofit financial management tools

Philanthropy Network Greater Philadelphia
230 South Broad Street, Suite 402| Philadelphia, PA 19102 | 215-790-9700
www.philanthropynetwork.org

15