



# GRANT APPLICATION GUIDELINES

*Developed by Delaware Valley Grantmakers, foundation and nonprofit professionals to streamline the grantwriting process.*

*Updated July 2005*

## IMPORTANT NOTE! READ THIS BEFORE APPLYING

This form is designed to guide applicants through some of the typical questions asked on a grant proposal form, and may be used as a basic template to organize thoughts and consider strategies. A list of those grantmakers who accept this form as a complete application is located on the back of the Application Cover Summary. See the Application Checklist included in this packet before submitting applications.

## DO YOUR HOMEWORK! USE THESE TIPS AND TOOLS

- **Communicate with funders.** Contact each funder to obtain a copy of funding guidelines, deadlines and/or annual report. Be aware of each funder's preferred method of initial contact and number of copies of the application you should submit. If in doubt, ask for clarification from the funder.
- **Be strategic.** Make sure that your goals, objectives and amount requested match the criteria of the funder you are approaching. Tailor your application to meet each funder's specifications.
- **Follow the directions.** Write clearly and follow the format of the application closely.
- Do not skip questions unless they in no way apply to your request. Avoid repetition. Less is more!
- Consult the **Regional Foundation Center** at the Free Library of Philadelphia at 215-686-5423 for information about the funders you plan to contact.
- Use the Directory of PA Foundations (call 610-544-6927 to order).
- Use the Pennsylvania Non-Profit Handbook (call 717-238-3787 to order).
- Check the Resources for Grantseekers section of [www.dvg.org](http://www.dvg.org) for a more complete glossary of grantwriting terms.

## GRANTWRITING GLOSSARY OF TERMS

### TYPES OF GRANTS:

**Challenge grant:** Funder sets fundraising goal for grantseeker to reach; reward if met.

**Capital grant:** Funding for endowment purposes, 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.

**Matching grant:** Funder agrees to match amount that grantseeker raises in fundraising.

**Project/Program grant:** Funding for specific initiative or new endeavor, not general purpose.

**Technology grant:** Funder donates technological equipment (computers, phone system, etc).

### TERMS USED IN APPLYING:

**Budget:** The financial plan for your grant, itemized to show breakdown of both income and expenses.

**Consultant:** A professional who is not on-staff but who lends periodic expertise.

**Contract:** A legal document that specifies work/services provided as part of grant.

**Dissemination:** Distribution of results or information to others.

**Evaluation:** Qualitative and quantitative assessment of project. Did you meet your goals?

**Goals:** The broad outcomes expected from project. Unlike objectives, not directly measurable.

**Objectives:** Specific, measurable aims for project, with matching outcomes to measure them.

**Outcomes:** Expected results of project that can be used to measure its success.

## GRANT APPLICATION COVER SUMMARY

*Complete this form by either filling-in the information on this sheet or by reproducing the form exactly. Listed on the reverse are those grantmakers who accept the Common Grant Application and Common Report Forms, either in whole or in part, as official application forms.*

1. **Legal Name of organization:** \_\_\_\_\_  
Address, Telephone and Fax: \_\_\_\_\_  
\_\_\_\_\_  
Email address: \_\_\_\_\_ Web address: \_\_\_\_\_  
Name and title of Contact Person: \_\_\_\_\_  
Name of Executive Director: \_\_\_\_\_  
Name of President of Board: \_\_\_\_\_  
Federal ID number: \_\_\_\_\_
2. **IRS 501(c) (3) nonprofit? Please circle: YES NO**  
If **Yes**, please attach copy of designation letter from the IRS.  
If **No**, please identify your fiscal agent and attach the written agreement from the fiscal agent.
3. **Amount Requested: \$** \_\_\_\_\_
4. **Type of Grant Requested** [Operating, Project, Challenge, Matching, Technology, Capital]:
5. **State Your Organization's Mission** (2 Sentences):
6. **Summarize the proposal and its strategic link with this funder**, including the **name** of the project or the capital campaign, if applicable (4 Sentences):
7. **List the Proposal's Target Population, Constituents, and Geographic Communities:**
8. **Total number of organization's Board Members:** \_\_\_\_\_
9. **Total number of organization's Employees:** Full Time \_\_\_\_\_ Part Time \_\_\_\_\_ Volunteer \_\_\_\_\_
10. **Total annual organizational budget: \$** \_\_\_\_\_ **Dates of fiscal year:** \_\_\_\_\_
11. **Project or capital budget (if applicable): \$** \_\_\_\_\_
12. **Time period this grant will cover:** \_\_\_\_/\_\_\_\_/\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_
13. **Does your organization receive support from United Way, Combined Health, Arts Council or any other federated funds? Please circle: YES NO**  
If **Yes**, percentage of total operating budget supported by federated funds: \_\_\_\_\_%
14. **List previous support from this funder in the last five years, purpose, amount and date:**  
\_\_\_\_\_  
\_\_\_\_\_
15. **Signature of Executive Director:** \_\_\_\_\_ **Date:** \_\_\_\_\_

# GRANT PROPOSAL NARRATIVE

*Please provide the following information in this order.  
Do not use more than 5 pages, exclusive of attachments.*

## I. Organizational Information

1. Brief Summary of Organization's history and mission.
2. Description of current programs, activities, service statistics and strengths/accomplishments (highlighting the past year), including what makes your organization unique.

## II. Purpose of Grant

1. If applying for **general operating support**, please explain your need for support and also the impact this support will have. Please see "Attachments" (below) regarding requests for financial information.
2. If your request is for a specific **project, program, challenge, matching, technology or capital grant**, please provide the following information:

### **Needs and Capabilities**

- The situation—opportunity, problem, issue, need, and the community—that your proposal addresses, and how that need was determined.

### **Goals and Activities**

- Your goals and objectives.
- Specific, measurable activities to accomplish these objectives.
- Who will carry out those activities (if this is a collaboration, briefly describe the partners).
- Timeline in which all of this will take place, with specific start/end dates.
- If applying for technology, what is your plan for managing the technology? (Include backup/maintenance, potential for growth/upgrades, staff training, use of consultants, etc.)

### **Impact of Activities**

- How the proposed activities will impact the designated community or population.
- How you will measure the results, and how the results will be used, disseminated, or publicized.
- How you plan to sustain the project after the funding period has expired.

## III. Attachments

### 1. Financial Information

For **ALL grants**, please submit the following information:

- Organization's annual operating budget and actual income and expenses for most recently completed fiscal year **AND** for current year-to-date.
- Itemized budget for how this specific grant will be used. Identify each source of revenue, the amount, and whether funds are either committed or pending. If request is for a multi-year grant, include multi-year program budget. (If desired, use attached Sample Budget Form.)
- Organization's most recent **AUDITED** financial statement (if budget greater than \$100,000) or Form 990 (if budget between \$25,000 and \$100,000). If neither document is available, include unaudited financial statement.
- Organization's three (3) largest funders in the last fiscal year and type of grant.

### 2. Other Supporting Materials

- Latest annual report or summary of the organization's prior year activities.
- Current board list with members' employment affiliations, constituencies, and years served.
- One-paragraph description of key staff, including qualifications relevant to this request.
- Grantee report (if previously funded).
- Letters of agreement from any collaborating agencies, if applicable.
- Letters of support and/or recent reviews or articles, if available.

## GRANT APPLICATION CHECKLIST

### DID YOU INCLUDE...

#### **Check Box**

- A completed Grant Application Cover Summary with contact information?
  - A copy of the IRS letter confirming your organization's 501(c)(3) status?
  - A completed Grant Proposal Narrative not exceeding five (5) 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?
  - List of three largest funders in the last fiscal year and type of grant?
  - 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)?
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## GRANT REPORT NARRATIVE

*Please limit your narrative to 4 pages total. Some questions may not apply to your grant.*

If you are reporting on a **GENERAL OPERATING GRANT**, please provide the following information:

- Describe organizational and/or programmatic achievements and setbacks during the grant period.
- Describe significant board and/or staff changes during the grant period.
- Explain how you measured the effectiveness of your activities against your goals and objectives. What have you learned? What would you do differently?
- Please submit actual end-of-year income and expenses for the organization for the year in which the grant was used.

If you are reporting on a **PROJECT, PROGRAM, CHALLENGE, MATCHING, TECHNOLOGY OR CAPITAL GRANT**, please provide the following information:

### 1. Results

- List the original goals and objectives of the grant, and tell how they were met during this reporting period. Include the impact it made on your organization, community, and/or the population served.
- In what ways did the actual project vary from your initial project plans? Describe how/why.
- Describe any unanticipated outcomes, benefits or challenges encountered with this project, including current status on meeting any special terms of this grant. (For example, if this was a challenge grant, did you meet the challenge?)
- If applicable, attach selected material relating to the funded project: press or news items, brochures, letters of support, photographs, etc.

**If you are reporting on a technology grant**, provide the following additional information:

- How has the technology improved your communication or management capabilities?
- How has your staff adapted to the new system, and how is the technology being supported?
- What future plans do you have for upgrades or growth of this technology?

### 2. Lessons Learned

- What are the most important results and lessons you have learned from this project?
- How will you use what you have learned to inform future work?
- What recommendations can you make to funders or others working in this field?
- If you were to undertake this project again, what would you do differently?

### 3. Future Plans

- What is your plan for this project in the future? Briefly describe rationale for ongoing funding, expansion, replication or termination.

### 4. Financials

- Using the original budget included with your proposal, provide an itemized budget of actual expenses and income for the project for this period. 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 project financial statement if appropriate. Enclose your most recent audit.
- Who else has funded this project, and at what level?

## SAMPLE BUDGET FORM

*This form is to be used as a guideline for writing a budget for a grant application. Some items listed will not apply to your organization or project, and some grantmakers will specify the format in which they would like budgets to be submitted. **As always, contact the grantmakers to whom you are applying in order to find out their specific application requirements.***

INCOME/REVENUE	COMMITTED	PENDING
1. Fundraising Events		
2. Gifts/Bequests		
3. Miscellaneous contributions		
4. Foundation support		
5. Corporate grant support		
6. United Way		
7. Grants/Contracts: Gov't agencies		
8. Program/service fees		
9. Membership Dues/Individual donations		
10. Investment income/transactions		
11. Earned Miscellaneous Revenue		
<b>12. TOTAL INCOME/REVENUE</b>		

EXPENSES	TOTAL EXPENSES	EXPENSES COVERED BY REQUESTED GRANT
13. Salaries of Provider Staff		
14. Fringe Benefits		
15. Professional fees (contract, consultant)		
16. Supplies (consumable)		
17. Printing and Postage		
18. Rent/Utilities		
19. Phone and fax		
20. Travel and Meetings		
21. Training		
22. Evaluation		
23. Equipment Purchases/Rental		
24. Miscellaneous expenses		
<b>25. TOTAL EXPENSES</b>		
26. SURPLUS (DEFICIT)		

***Keep in mind...***

- If you feel elements of your budget require explanation, please do so in a brief narrative.
- Remember that the budget you submit with your application will be the basis of your financial reporting throughout the grant period (including your final report).

**LIST OF DVG MEMBERS WHO ACCEPT COMMON GRANT APPLICATION and/or  
COMMON REPORT FORM  
in whole or in part**

*IMPORTANT: Please **CHECK WITH EACH GRANTMAKER** for funding guidelines, proposal deadlines,  
and any other application requirements.*

Grantmaker	Phone	Email	Accepts CRF?	Website
ACE INA Foundation	215-640-1737	<a href="mailto:eden.kratchman@ace-ina.com">eden.kratchman@ace-ina.com</a>	Yes	<a href="http://www.ace-ina.com/">www.ace-ina.com/</a>
ARAMARK	215/238-3271	<a href="mailto:irvin-donna@aramark.com">irvin-donna@aramark.com</a>	Yes	<a href="http://www.aramark.com">www.aramark.com</a>
Brandywine Health & Wellness Foundation	610-380-9080	<a href="mailto:info@brandywinefoundation.org">info@brandywinefoundation.org</a>	Yes	<a href="http://www.brandywinefoundation.org">www.brandywinefoundation.org</a>
Campbell-Oxholm Foundation	610/667-4856	<a href="mailto:kcoxholm@comcast.net">kcoxholm@comcast.net</a>	No	Note: Does not accept unsolicited grant applications.
Joseph L. Carley Foundation	609/566-9027	<a href="mailto:jlcf@comcast.net">jlcf@comcast.net</a>	Yes*	Note: CGA only accepted for recipients in Cumberland County, NJ
Chester County Community Foundation	610/696-8211	<a href="mailto:info@chescofcf.org">info@chescofcf.org</a>	Yes	<a href="http://www.chescofcf.org">www.chescofcf.org</a>
Connelly Foundation	610/834-3222	<a href="mailto:vkflaville@connellyfdn.org">vkflaville@connellyfdn.org</a>	Yes	<a href="http://www.connellyfdn.org">www.connellyfdn.org</a>
Dolfinger-McMahon Foundation	215/979-1768	<a href="mailto:renz@duanemorris.com">renz@duanemorris.com</a>	Yes	n/a
Samuel S. Fels Fund	215/731-9455	n/a	Yes	<a href="http://www.samfels.org">www.samfels.org</a>
Fourjay Foundation	215-830-1438	<a href="mailto:info@fourjay.org">info@fourjay.org</a>	No	<a href="http://www.fourjay.org">www.fourjay.org</a>
The Grundy Foundation	215/788-5460		Yes	<a href="http://www.grundyfoundation.com/">www.grundyfoundation.com/</a>
Frank & Marie Hamilton Charitable Trust	215/587-0818	<a href="mailto:jkaplan@E-ALB.com">jkaplan@E-ALB.com</a>		n/a
The HBE Foundation	610/688-0143	<a href="mailto:Bmbrown9999@aol.com">Bmbrown9999@aol.com</a>	Yes	n/a
IBM Corporation	610/578-2258	<a href="mailto:dmelley@us.ibm.com">dmelley@us.ibm.com</a>	No	<a href="http://www.ibm.com/ibm/ibmqives/">www.ibm.com/ibm/ibmqives/</a>
Patricia Kind Family Foundation	Unlisted	<a href="mailto:PKFFoundation@comcast.net">PKFFoundation@comcast.net</a>	Yes	<a href="http://www.pkffoundation.net">www.pkffoundation.net</a>
The Lenfest Foundation	610/828-4510	<a href="mailto:lenfestfoundation@lenfestfoundation.org">lenfestfoundation@lenfestfoundation.org</a>	Yes	<a href="http://www.lenfestfoundation.org">www.lenfestfoundation.org</a>
McLean Contributionship	610/527-6330 x 1	<a href="mailto:SandraMcL@aol.com">SandraMcL@aol.com</a>	Yes	<a href="http://www.fdncenter.org/grantmaker/mclean">www.fdncenter.org/grantmaker/mclean</a>
PNC Financial Services Group	215-585-5152	<a href="mailto:katherine.moore@pnc.com">katherine.moore@pnc.com</a>	Yes	<a href="http://www.pnc.com">www.pnc.com</a>
Prudential Financial	215-784-8147	<a href="mailto:Weston.somerville@prudential.com">Weston.somerville@prudential.com</a>	Yes	<a href="http://www.prudential.com/community">www.prudential.com/community</a>
Spector Gadon and Rosen Foundation	215-241-8911	<a href="mailto:sschiller@lawsgr.com">sschiller@lawsgr.com</a>	Yes* ONLY CRF NOT CGA	<a href="http://www.lawsgr.com/sgrf.shtml">www.lawsgr.com/sgrf.shtml</a>
Stewart Huston Charitable Trust	610-384-2666	<a href="mailto:admin@stewarthouston.org">admin@stewarthouston.org</a>	Yes	<a href="http://www.stewarthouston.org/">www.stewarthouston.org/</a>
Subaru of America Foundation, Inc.	856/488-5099	<a href="mailto:foundation@subaru.com">foundation@subaru.com</a>	Yes	<a href="http://www.subaru.com">www.subaru.com</a>
Rosenlund Family Foundation	Unlisted	n/a	Yes	n/a
Union Benevolent Association	215/843-1981	<a href="mailto:UBAPhila@aol.com">UBAPhila@aol.com</a>	Yes	n/a
The Vanguard Group Foundation	610/669-6331	<a href="mailto:tami_wise@vanguard.com">tami_wise@vanguard.com</a>	Yes	n/a
Waste Management Inc.	215/428-3255	<a href="mailto:grush@wm.com">grush@wm.com</a>	Yes	<a href="http://www.wm.com">www.wm.com</a>
Woosnam Family Foundation	215/545-5505	n/a	Yes	n/a

**List revised July 2005**