Vetting for Success: Grant Seeking Skills
Goals of Workshop

- To educate attendees about effective strategies and the tools available to optimize funding opportunity searches.

- To enhance your vetting skills, whereby increasing the likelihood of their grants being funded.
Aggregate Fiscal Data of Foundations in the U.S., 2014

- **Total No. of Foundations**: 86,726
- **Total Giving**: $60,244,456,505
- **Total Assets**: $865,249,516,054
- **Total Gifts Received**: $56,699,523,467
## Aggregate Fiscal Data of Foundations in the U.S. by Foundation Type, 2014

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>No. of Foundations</th>
<th>Total Giving</th>
<th>Assets</th>
<th>Gifts Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Independent</td>
<td>79,729</td>
<td>$41,267,572,141</td>
<td>$712,448,429,149</td>
<td>$34,859,690,975</td>
</tr>
<tr>
<td>Operating</td>
<td>3,687</td>
<td>$7,349,471,530</td>
<td>$44,659,312,807</td>
<td>$8,056,945,515</td>
</tr>
<tr>
<td>Corporate</td>
<td>2,521</td>
<td>$5,117,917,028</td>
<td>$267,109,356,280</td>
<td>$4,564,690,486</td>
</tr>
<tr>
<td>Community</td>
<td>789</td>
<td>$6,509,495,806</td>
<td>$82,033,638,418</td>
<td>$9,198,196,491</td>
</tr>
</tbody>
</table>
What is Vetting?

Vetting = Thorough examination of a potential funding opportunity in order to determine if your agency and project is a good fit to the funder’s funding focus.
A Perfect Match
Why Vet?

• To determine if your agency and your project / program fits the funder’s funding focus.

• To create more targeted proposals and increase your likelihood of being funded.
How Much Time Vetting?

- Ten to one rule: For every 10 foundations reviewed, one is usually a good fit.

- 30-70% rule: 30% of grant writing is grant seeking / vetting.
• A great business strategy is “bulk grant seeking” – charging each client only one hour a week (4 hrs a month) and they get 8 hrs a week (32 hrs a month) of searching time.
1. Look at funder’s web site
2. Internet Search of Funder
3. The Foundation Center
4. 990 Review
5. Call funder
1. Funder’s website

- Mission statement and strategic plan
- Funding focus and geographic location
- Eligibility and restrictions
- Board members
- Who funded/previous awards and how much
- Recent PR
- Annual reports
- 990
- Location/address of foundation
Demonstrating its commitment to preserving the dignity and independence of the poorest and frailest older adults, the Weinberg Foundation has set a course to identify and implement the best practices in supporting both informal and paid caregivers.
1. Funder's Website

Grant Guidelines

Geographic Focus

Those applying for a grant should give special attention to the Weinberg Foundation's geographic focus, which provides the "first cut" in the initial review of a request. Capital grants throughout the United States and Israel will be considered in any of our program areas, subject to the Foundation's other grantmaking criteria. But please contact the appropriate program team member to discuss your request before submitting your Letter of Inquiry (LOI), received on a rolling basis.

<table>
<thead>
<tr>
<th>Areas of Giving***</th>
<th>Maryland, NE Pennsylvania, Hawaii, Greater Chicago</th>
<th>National</th>
<th>Israel</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Capital</td>
<td>Program/ Operating</td>
<td>Capital</td>
</tr>
<tr>
<td>Older Adults</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Workforce Development</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Education</td>
<td>●</td>
<td>*</td>
<td>●</td>
</tr>
<tr>
<td>Disabilities</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
</tbody>
</table>

Funding Focus and Geography
The Small Grants Program (SGP) allows smaller nonprofits in Maryland, Northeastern Pennsylvania, and Greater Chicago to apply for a grant of up to $50,000 for two years ($100,000 total). This program includes all Foundation areas of giving.

Eligibility

To be considered for SGP funding, an organization must meet several requirements:

- Be a nonprofit organization with 501(c)(3) tax-exempt status; have operated for a minimum of three years; and have audited or reviewed financial statements.
- Maintain an annual organizational budget of $1 million or less within Maryland, Northeastern Pennsylvania, or Greater Chicago.
- Provide direct services primarily to residents of Maryland, Northeastern Pennsylvania, or Greater Chicago.
- Meet the Foundation’s mission of providing direct services to low-income and vulnerable populations.
- Request funds for general operating support, program support, or capital projects.
- Submit requests that represent no more than 25 percent of the organization’s total annual operating budget.

Restrictions
The following is a list of activities and types of agencies that are ineligible for funding from People’s United Community Foundation:

- Activism or community organizing
- Advertising (yearbooks, journals, publications, etc.)
- Advocacy
- Animal causes
- Annual appeals and operational fund raising campaigns.
- Arts & Culture organizations, programs, activities and events
- Beauty contests
- Behavioral/mental health
- Capital requests or campaigns
- Childcare/Daycare agencies or programs, subsidies & scholarships (not part of an accredited Head Start or School Readiness program for low income children)
- Conferences, seminars, panel discussions and trips
- Conservation, environmental causes
- Consultants
- Debt reduction
- Discriminatory organizations or activities based on race, religion, etc.
- Disease specific organizations and activities
- Endowments
- Event Sponsorships
- Fiscal Agents or Fiduciaries
- Fundraising Activities/Events (golf tournaments, road races, etc.)
- Health & healthcare programs
- Historic Preservation
- Individuals
- IRS Sub Classification of 509(a)3 Supporting Organization
- Limited/very small number of individuals being served by an organization/program
- Media-related initiatives (television, radio, film, video and books)
- Medical equipment, patient treatment funds, etc.
- Municipal/government entities
- Nursery Schools
- Obesity programs
- Pilot programs, new initiatives and start-ups
- Political Action Committees (PAC’s)
- Political, labor, civic or fraternal organizations
- Private Foundations
- Private schools, colleges and prep schools
- Private scholarships/tuition
- Programs, agencies and communities outside of our geographic footprint.
- Public school districts and their individual schools
- Religious organizations, unless supporting non-sectarian broad based community issues
- Research and feasibility studies
- Sports, athletic events, or recreational programs/organizations
- Sponsorships or projects where the Bank or its employees receive tangible benefits or privileges
- Student trips/tours (including transportation and conference costs)
- Substance abuse programs
- Team sponsorships
- Theater, dance and music programs
- Stand-alone or as part of a youth development/enrichment program
- Third parties raising funds for a charity
1. Funder’s website

Board list
1. Funder’s website

- Media Releases
  - PR
  - Awards
- Contact Us
FOR IMMEDIATE RELEASE

Media Contact: Craig Demchak, 443-738-1159
cdemchak@hjweinberg.org

Weinberg Foundation Announces $1 Million in Grants as Part of $3 Million Summer Funding Collaborative

Addition of two corporate partners marks largest number of funding partners to date

BALTIMORE (April 18, 2017) – The Harry and Jeanette Weinberg Foundation, one of the largest private foundations in the United States, today announced $1,000,000 in grants to support 41 summer programs as part of the $3 million Baltimore Summer Funding Collaborative. The initiative was created to fund high-quality summer programs that serve low-income Baltimore City youth.


Despite individual missions and priorities that include literacy; science, technology, engineering, and math (STEM); youth employment; environmental education; sports; and the arts, all 11 members of the Collaborative share the same goal: to reduce summer learning loss and ensure more youth have the chance to reach their full potential during the summer and beyond.

“Research shows us that youth in low-income families, unlike their peers from higher-income families, often lack access to activities that keep their minds engaged over the summer,” said Donn Weinberg, Weinberg Foundation Trustee and Executive Vice President. “This funding is a tangible investment in improved academic and life outcomes for thousands of young people in Baltimore City.”

The following organizations will be funded specifically by the Weinberg Foundation:

- Access Art
- Afya Baltimore
- Art with a Heart
- Baltimore Montessori Public Charter School
- The Baltimore Youth Alliance
- The Be. Org
- Maryland Out of School Time Network
- MdBio Foundation
- Next One Up Foundation
- Parks & People Foundation
- Patterson Park Public Charter School
- Play On Purpose (P.O.P.)
Demonstrating its commitment to preserving the dignity and independence of the poorest and frailest older adults, the Weinberg Foundation has set a course to identify and implement the best practices in supporting both informal and paid caregivers.
2. Internet Search of Funder

• Google the foundation name and the following words: “grants,” “recent grants,” “grant awards,” and “awards grant to.”

• Example
  – Josiah Macy Jr. Foundation awards grant to
Josiah Macy, Jr. Foundation - Official Site
macyfoundation.org
Apply for a Grant. Apply for a Grant ... With support from the Josiah Macy Jr. Foundation, New York University is currently leading a consortium of 12 medical schools ... Apply for a Grant · Our Priorities · Staff · Publications · From The President · Board of Directors

News about Josiah Macy Jr Foundation Awards Grant To
bing.com/news
Schwartz Center and AACN Receive Macy Grant to Launch Compassion Scholars Program
Press Release Point · 7 days ago
Through its National Compassionate Caregiver of the Year Award, the Center celebrates healthcare ... For information, visit www.aacn.nche.edu. About the Josiah Macy Jr. Foundation Since 1930, the ... Schwartz Center and the American Association of Colleges of Nursing Receive Scholarship Grant from the Josiah Macy Jr. Foundation
Financial Content · 6 days ago
today announced that they have received a $33,000 grant from the Josiah Macy Jr. Foundation to develop a Compassion Scholars Program. The first Compassion Scholars Program will be held in ... Macy Foundation Awards Grant to Fund Interprofessional ... https://www.aacn.nche.edu/news-and-events/publications/archives/2012/... Macy Foundation Awards Grant to Fund ... was awarded a $100,110 board grant from the Josiah Macy Jr. Foundation. Provided under the Foundation's ... Josiah Macy Jr. Foundation - Financial Diligence Networks
https://secure.gofdn.com/files/1636s57352183a4t · The Josiah Macy, Jr. Foundation has named Peter ... received a major grant award from the Josiah Macy Jr. Foundation for $600,000 to expand its ... Macy Foundation Grant to Help Shape Interprofessional ... www.nln.org/newsroom/news-releases/news-release/2011/1024/macy · Macy Foundation Grant to Help ... a $35,000 Presidents Grant from the Josiah Macy Jr. Foundation to organize two ... award will fund a meeting of ... Mount Sinai School of Medicine Awarded Grant by the Josiah ... www.mountsinai.org · Newsroom · News Releases · Hospital Ratings and Awards ... Grant by the Josiah Macy Jr. Foundation The grant will go toward instilling... both The Mount Sinai Hospital and Mount ...
3. The Foundation Center
990 Finder

Search our database of Forms 990 and 990-PF.

Look up the 990s of private foundations, public charities, and other nonprofits.

990 Finder gives you free access to nearly 3 million of the most recent Forms 990 and 990-PF filed by nonprofit organizations with Internal Revenue Service (IRS).

Search 990 Finder

Foundation Center does not control information in the tax returns that it receives from the IRS. If a user believes any information in a return should not be displayed or is incorrect, we encourage you to contact the organization that prepared the return. You may also notify us, and we will use reasonable efforts to remove information, where appropriate. Foundation Center makes no warranty of any nature about any information in tax returns displayed on its web site.

Notice: The IRS has announced processing errors on electronically filed Forms 990 for filing years 2007-2010.

IRS_990_notice

For an at-a-glance look at what you’ll find on these documents, view these samples:

Diagram of Form 990-PF

Diagram of Form 990

To learn more about the Form 990-PF, see Demystifying the 990-PF.
Foundation Directory Online

FDO makes it easy to turn foundations into funders. It’s the only resource you need to search for the foundations most likely to give you grants and manage your prospects through to funding.

Foundation Directory Online (FDO) makes your foundation fundraising easier — and more effective.

FDO simplifies and speeds up your process with:

- A thorough database, comprising more than 140,000 grantmakers, that’s updated weekly so you can bank on the accuracy of results.
- Advanced filters and an assessment tool help you quickly identify your best potential funding sources.
- A prospect management platform that automates much of the grantseeking process and stores your data for you.

Subscription Plans

We can give you results Google can’t.

Essential

- 10,000+ grantmaker profiles
- 500,000+ key decision makers and leaders
- Keyword search 990s
- Workspace

$49.99/mo.

SIGN UP NOW

Professional

- 140,000+ expanded grantmaker profiles
- 500,000+ key decision makers and leaders
- Keyword search 990s and 990-PFs
- Workspace
- 5.6 MILLION+ grants
- Power search
- Maps and charts

SIGN UP NOW

Enterprise solutions available too, give your entire organization access. REQUEST QUOTE
Find Us

The Foundation Center provides free funding information through more than 400 Funding Information Network locations (formerly called Cooperating Collections) — libraries, community foundations, and other nonprofit resource centers located across the U.S. and several countries. Use this map to find a network location near you. About the Funding Information Network

Location Enter ZIP code, city, state or country Search

Point from which distance is measured Funding Information Network location

FUNDING INFORMATION NETWORK LOCATIONS

<table>
<thead>
<tr>
<th>Name</th>
<th>City</th>
<th>State/Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academy for Grassroots Organizations - Rancho Cucamonga</td>
<td>Rancho Cucamonga</td>
<td>CA</td>
</tr>
<tr>
<td>Advance Memorial Library</td>
<td>Poughkeepsie</td>
<td>NY</td>
</tr>
<tr>
<td>Akron-Summit County Public Library</td>
<td>Akron</td>
<td>OH</td>
</tr>
<tr>
<td>Albright Memorial Library</td>
<td>Scranton</td>
<td>PA</td>
</tr>
<tr>
<td>Alexandria Library</td>
<td>Alexandria</td>
<td>VA</td>
</tr>
<tr>
<td>Allen County Public Library - Paul Clarke Nonprofit Resource Center</td>
<td>Fort Wayne</td>
<td>IN</td>
</tr>
<tr>
<td>Allentown Public Library</td>
<td>Allentown</td>
<td>PA</td>
</tr>
<tr>
<td>Alliance for Nonprofit Excellence</td>
<td>Memphis</td>
<td>TN</td>
</tr>
<tr>
<td>Alpena County George N. Fletsher Public Library</td>
<td>Alpena</td>
<td>MI</td>
</tr>
<tr>
<td>Amarillo Area Foundation</td>
<td>Amarillo</td>
<td>TX</td>
</tr>
</tbody>
</table>
Win more grants and make a bigger difference.
Find the right funders now.

Describe what you are trying to fund:
Examples: Ballet school in New York City; Animal shelter in Portland, OR; Food pantry in Dallas

What is Workspace?
Spend more time making a difference and less time managing your prospects. You can also save search criteria and track your favorite grantmakers.

And More!
Keep your contacts, make notes on prospects, and see your funding history all in one place.

MANAGE YOUR TASKS
Track progress and deadlines on tasks.

ASSESS FOUNDATIONS
Find the best fit for your mission and audience to prioritize your grant requests.

TRACK YOUR PROGRESS
Monitor your progress towards your funding goals.

Goal $300,000
Requested $835,000
Funded $860,000
Win more grants and make a bigger difference.
Find the right funders now.

What is Workspace?
Spend more time making a difference and less time managing your prospects. You can also save search criteria and track your favorite grantmakers.

And More!
Keep your contacts, make notes on prospects, and see your funding history all in one place.
### Find Funding: **Grantmakers**

SHOWING GRANTMAKER RESULTS FOR “Tarrytown (New York, United States)”

Describe what you are trying to fund:

<table>
<thead>
<tr>
<th>Grantmaker</th>
<th>City</th>
<th>State</th>
<th>Country</th>
<th>Total Assets</th>
<th>Total Giving</th>
<th>Amount Funded</th>
<th>Grant Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>The New York Community Trust</td>
<td>New York City</td>
<td>NY</td>
<td>United States</td>
<td>$2,552,425,551</td>
<td>$195,554,486</td>
<td>$921,642</td>
<td>145</td>
</tr>
<tr>
<td>Rockefeller Philanthropy Advisors, Inc.</td>
<td>New York City</td>
<td>NY</td>
<td>United States</td>
<td>$124,561,808</td>
<td>$63,364,165</td>
<td>$655,500</td>
<td>37</td>
</tr>
<tr>
<td>Fidelity Charitable Gift Fund</td>
<td>Cincinnati</td>
<td>OH</td>
<td>United States</td>
<td>$15,343,987,929</td>
<td>$4,607,982,076</td>
<td>$95,282</td>
<td>37</td>
</tr>
<tr>
<td>The JPMorgan Chase Foundation</td>
<td>New York City</td>
<td>NY</td>
<td>United States</td>
<td>$198,481,655</td>
<td>$159,401,094</td>
<td>$428,850</td>
<td>29</td>
</tr>
<tr>
<td>M&amp;T Charitable Foundation</td>
<td>Buffalo</td>
<td>NY</td>
<td>United States</td>
<td>$41,966,443</td>
<td>$22,775,716</td>
<td>$50,463</td>
<td>26</td>
</tr>
<tr>
<td>TD Charitable Foundation</td>
<td>Portland</td>
<td>ME</td>
<td>United States</td>
<td>$21,935,201</td>
<td>$16,710,276</td>
<td>$289,600</td>
<td>25</td>
</tr>
<tr>
<td>New York Life Foundation</td>
<td>New York City</td>
<td>NY</td>
<td>United States</td>
<td>$103,875,266</td>
<td>$16,542,328</td>
<td>$364,100</td>
<td>23</td>
</tr>
<tr>
<td>The Bank of America Charitable Foundation, Inc.</td>
<td>Charlotte</td>
<td>NC</td>
<td>United States</td>
<td>$5,527,756</td>
<td>$149,183,853</td>
<td>$98,600</td>
<td>22</td>
</tr>
<tr>
<td>Verizon Foundation</td>
<td>Basking Ridge</td>
<td>NJ</td>
<td>United States</td>
<td>$9,071,029</td>
<td>$32,680,580</td>
<td>$101,854</td>
<td>21</td>
</tr>
<tr>
<td>Vanguard Charitable Endowment Program</td>
<td>Boston</td>
<td>MA</td>
<td>United States</td>
<td>$4,539,460,183</td>
<td>$597,551,260</td>
<td>$1,490,235</td>
<td>19</td>
</tr>
<tr>
<td>Franke Family Charitable Foundation</td>
<td>Chicago</td>
<td>IL</td>
<td>United States</td>
<td>$42,872,710</td>
<td>$1,985,675</td>
<td>$97,500</td>
<td>14</td>
</tr>
</tbody>
</table>
St. Faith's House Foundation
North Creek, NY, United States | Who's Who | + Contact Info

St. Faith's House Foundation Last 5 Years At A Glance
They've funded 111 grants to 42 organizations totaling $1,434,500

What Is Being Funded?

Where is the Money Going?

How Big are the Grants?

Grants

Most Common Grant Amount: $10,000

SHOWING GRANTS FOR “Tarrytown (New York, United States)"

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Recipient City</th>
<th>Recipient State</th>
<th>Recipient Country</th>
<th>Primary Subject</th>
<th>Year</th>
<th>Grant Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elizabeth Mascia Child Care Center</td>
<td>Tarrytown</td>
<td>New York</td>
<td>United States</td>
<td>Child care</td>
<td>2016</td>
<td>$25,000</td>
</tr>
<tr>
<td>YMCA Family at Tarrytown</td>
<td>Tarrytown</td>
<td>New York</td>
<td>United States</td>
<td>Human services</td>
<td>2016</td>
<td>$15,000</td>
</tr>
<tr>
<td>YMCA Family at Tarrytown</td>
<td>Tarrytown</td>
<td>New York</td>
<td>United States</td>
<td>Human services</td>
<td>2015</td>
<td>$50,000</td>
</tr>
<tr>
<td>YMCA Family at Tarrytown</td>
<td>Tarrytown</td>
<td>New York</td>
<td>United States</td>
<td>Human services</td>
<td>2015</td>
<td>$15,000</td>
</tr>
<tr>
<td>Mental Health Association of Westchester County</td>
<td>Tarrytown</td>
<td>New York</td>
<td>United States</td>
<td>Human services</td>
<td>2015</td>
<td>$1,000</td>
</tr>
</tbody>
</table>
Funding Interests

Subjects
- Child care
- Child welfare
- Environmental education
- Family services
- Homeless services

Geographic Focus
- New York

Population Groups
- Adolescents
- Children
- Children and youth
- Female adolescents
- Female children and youth

Support Strategies
- Continuing support
- Program development

Transaction Types
- Matching grants

Organization Types
- Independent Foundation

About

Purpose and Activities
Giving for homeless children, pregnancy prevention programs for at-risk teens, and tuition assistance for day care. Grants limited to organizations that provide services to children and young people of Westchester County, New York.

Other Funders to Consider

Based on similar patterns of giving (subject area, geographic area served and grant amounts)

- Faith Home Foundation
  Amityville, NY
  Community Development, Health, Environment

- Vidae W. Bernard Foundation
  Brooklyn, NY
  Community Development, Employment, Health, Education, Recreation

- Charles S. Keene Foundation
  Long Island City, NY
  Community Development, Health, Arts and Culture, Education, Human Services

- The Frank J. Antun Foundation
  Woodbury, NY
  Community Development, Health, Arts and Culture, International/Foreign Affairs, Employment

- The Vincent and Carol W. Dean Family Charitable Foundation
  Poughkeepsie, NY
  Community Development, Environment, Medical Research

- Arthur S. Doerner Private Foundation Inc.
  Katonah, NY
  Community Development, Recreation, Education, Health, Safety/Disasters

- William Gundy Broughton Charitable Private Foundation, Inc.
  Glenville, NY
  Community Development, Health, Arts and Culture, Education, Environment
Applications/RFPs

Application form required.
Initial Approach: Proposal
Copies of proposal: 12
Board meeting dates: May and Nov.
Deadline(s): Sept. 1 and Mar. 1

GIVING LIMITATIONS

Giving restricted to Westchester County, NY.
No support for public or private institutions.
No grants to individuals, or for building, capital campaigns or endowment funds.

Financials

FOR FISCAL YEAR ENDED 2015-06-30

$11,993,776 TOTAL ASSETS
$654,000 TOTAL GIVING

Gifts Received: N/A
Expenditures: $797,060
Qualifying Distributions: $689,547

Giving Activities Include:
$654,000 for grants

Who's Who

See who can introduce you to someone at St. Faith's House Foundation

Governing Body (16)

Patricia Elms
Vice President
Laura F. Midgley
Assistant Secretary
Ann D. Phillips
Grant Comm Cons
Burnett Hansen
Director
Sarah Gardner
President
Heather Kenny
Director
Mary Jean Keenan
Director
Robert G. DeLaMATER
Secretary
Victoria Rutland
Assistant Secretary
Mr. Robert C. Myers
Director
Michael Lowery
Treasurer
Barbara Buxton
Director
Bruce Clark
Director
Marilyn Belling
Director
Sheri Bloom Tabacoff
Director
Druzilla R. Van Hengel
Director

St. Faith’s House Foundation
Independent foundation
EIN: 131740123
BRIDGE NUMBER: 562797
P.O. Box 579
North Creek, NY 12853-0579
E-mail: drew@bestweb.net

CONTACT INFORMATION
ADDITIONAL LOCATION INFORMATION
ADDITIONAL CONTACT INFORMATION
4. 990 Review

• Find 990s using The Foundation Center, CharityNavigator.org, CitizenAudit.org or GuideStar.

• Charity information service (also called “charity watchdog organizations”) that report on nonprofits – both foundations and nonprofit organizations.

• Many donors and funders look here for info on nonprofit organizations.
Mission

This organization has not provided GuideStar with a mission statement.
What to look for on a 990

- Foundation’s location
- What is the foundation’s total “assets?”
- Total giving last year?
- Do we know any of the Board of Directors?
- Will they accept unsolicited proposals? (Part XV)
- Who they funded?
- The amounts they funded?
- What type of projects have they funded?
- Where have they funded? (geographic location)
**Return of Private Foundation**

For calendar year 2014, or tax year beginning 12-01-2014, and ending 11-30-2015

**Name of Foundation:**

**Emporor/Institution number:** 38-3693767

Address:

**Deviations**

<table>
<thead>
<tr>
<th>Number</th>
<th>Description</th>
<th>Form 4947(a)(1) Trust Treated as Private Foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Initial return</td>
<td>Initial return of a former public charity</td>
</tr>
<tr>
<td>2</td>
<td>Final return</td>
<td>A final return of a former public charity</td>
</tr>
<tr>
<td>3</td>
<td>Amended return</td>
<td>Amended return</td>
</tr>
<tr>
<td>4</td>
<td>No change</td>
<td>No change</td>
</tr>
</tbody>
</table>

**Section 501(c)(3):** Exempt private foundation

**For market value of all assets at end of year:**

**Accounting method:**

- Cash
- Account
- Other (specify)

**Date of the Form:**

- 2014
- Public inspection

**Address:**

**Total giving/grants paid:**

**Total income:**

**Comprehensive**

- Contributions, gifts, grants, etc. received:
  - Total: 8,029,924

**Expenditures**

- Total: 13,582,499
  - Operating and administrative:
    - Compensation of officers, directors, trustees, etc.: 94,068
    - Other employee salaries and wages: 391,244
    - Pension plans, employee benefits: 4,372
    - Legal fees: 320,089
    - Accounting fees: 28,836
    - Other professional fees: 26,571
    - Interest: 6,236
    - Taxes (attach schedule): 3,980
    - Depreciation (attach schedule): 2,376
    - Occupancy: 18,204
    - Travel, conferences, and meetings: 14,969
    - Printing and publications: 22,113
    - Other expenses: 366,131
  - Total operating and administrative expenses: 1,402,637

- Total expenses and disbursements:
  - Add lines 19 through 23: 3,531,070
  - Subtract line 26 from line 12:
    - Excess of revenue over expenses and disbursements: 9,671,396
    - Net investment income (negative, enter “-“): 4,136,967
    - Adjusted net income (negative, enter “-“): 5,534,429

**Balance Sheet**

- Cash: 38,313
- Savings and temporary cash investments: 83,810
- Accounts receivable: 58,370
- Less: allowance for doubtful accounts: 58,370
Board list

Staff
### Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

<table>
<thead>
<tr>
<th>(a) Name and address</th>
<th>(b) Title, and average hours per week devoted to position</th>
<th>(c) Compensation (If not paid, enter -0-)</th>
<th>(d) Contributions to employee benefit plans and deferred compensation</th>
<th>(e) Expense account, other allowances</th>
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<tbody>
<tr>
<td>PETER SMITH</td>
<td>PRESIDENT 25 00</td>
<td>62,500</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>35 E GRASSY SPRAIN RD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>YONKERS, NY 10710</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SALVADOR NOVELLA</td>
<td>VICE PRESIDENT 3 00</td>
<td>24,000</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>37035 EXUMA BAY</td>
<td></td>
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<td>BOYNTON BEACH, FL 33436</td>
<td></td>
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<tr>
<td>BRENDAN BYRNE C/O CARELLO BYRNE</td>
<td>DIRECTOR 1 00</td>
<td>24,000</td>
<td>0</td>
<td>0</td>
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<tr>
<td>6 BECKER FARM RD</td>
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<td></td>
<td></td>
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<tr>
<td>ROSELAND, NJ 07068</td>
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<tr>
<td>MARIE HOLCOMBE</td>
<td>TREASURER 1 00</td>
<td>24,000</td>
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<td>0</td>
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<tr>
<td>19 HEWITT AVENUE</td>
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<td></td>
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<td>BRONXVILLE, NY 10708</td>
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<tr>
<td>BETTY GODLEY</td>
<td>DIRECTOR 1 00</td>
<td>24,000</td>
<td>0</td>
<td>0</td>
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<tr>
<td>4440E LADY BANKS LANE</td>
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<tr>
<td>MURRELLS INLET, SC 29576</td>
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Board list
Accepting unsolicited proposals

Contribution directions

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<th>Tax year</th>
<th>Prior 3 years</th>
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<th>(b) 2013</th>
<th>(c) 2012</th>
<th>(d) 2011</th>
<th>(e) Total</th>
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</table>

Complete 3a, b, or c for the alternative test relied upon

a. "Assets" alternative test—enter
   (1) Value of all assets
   (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b. "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c. "Support" alternative test—enter
   (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans, section 512(a)(5), or royalties)
   (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii)
   (3) Largest amount of support from an exempt organization
   (4) Gross investment income

Part XV

Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)

1. Information Regarding Foundation Managers:
   a. List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2))
   b. List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2. Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
   Check here □ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d
   a. The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
   b. The form in which applications should be submitted and information and materials they should include
   c. Any submission deadlines
   d. Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Form 990-PF (2014)
<table>
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<tr>
<th>Recipient</th>
<th>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</th>
<th>Foundation status of recipient</th>
<th>Purpose of grant or contribution</th>
<th>Amount</th>
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<tr>
<td>GREYSTON FOUNDATION 21 PARK AVENUE YONKERS, NY 10703</td>
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<td>GROUNDWORK HUDSON VALLEY 22 MAIN STREET YONKERS, NY 10701</td>
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<td>GUIDING EYES FOR THE BLIND 611 GRANITE SPRINGS ROAD YORKTOWN HEIGHTS, NY 10598</td>
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<td>PUBLIC CHARITY</td>
<td>UNRESTRICTED GRANTS</td>
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<td>INNER-CITY SCHOLARSHIP FUND 1011 FIRST AVENUE/SUITE 1400 NEW YORK, NY 10022</td>
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<tr>
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<td>JOYCE THEATER FOUNDATION 175 EIGHTH AVENUE NEW YORK, NY 10011</td>
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**Total**: 2,428,150
## Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments

<table>
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<tr>
<th>(a) Name and address of organization or government</th>
<th>(b) EIN</th>
<th>(c) IRC section if applicable</th>
<th>(d) Amount of cash grant</th>
<th>(e) Amount of non-cash assistance</th>
<th>(f) Method of valuation (book, FMV, appraisal, other)</th>
<th>(g) Description of non-cash assistance</th>
<th>(h) Purpose of grant or assistance</th>
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<td>42-1471089</td>
<td>501C3</td>
<td>38,086</td>
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<td>42-1374393</td>
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<td>BRAND AND PLAN DEVELOPMENT</td>
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<tr>
<td>WILLIAM PENN UNIVERSITY 201 TRUEBLOOD AVE OSAKOOSA, IA 52577</td>
<td>42-0707120</td>
<td>501C3</td>
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<td>LIBRARY ARCHIVES</td>
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</table>

---

**RECIPIENT NAME:**
ST PAULS COMMUNITY DEVELOPMENT CORP

**ADDRESS:**
451 VAN HOUTER STREET
PATerson, NJ 07501

**RELATIONSHIP:**
NONE

**PURPOSE OF GRANT:**
EMERGENCY MEN’S SHELTER

**FOUNDATION STATUS OF RECIPIENT:**
PC

**AMOUNT OF GRANT PAID** ........................................... 10,000.

---

**RECIPIENT NAME:**
COURT APPOINTED SPECIAL ADVOCATES O
MORRIS & SUSSEX COUNTIES INC

**ADDRESS:**
18 CATTANO AVE
MORRISTOWN, NJ 07960

**RELATIONSHIP:**
NONE

**PURPOSE OF GRANT:**
UPDATING THE CASA STATEWIDE MEDICAL ADVOCACY

**FOUNDATION STATUS OF RECIPIENT:**
PC

**AMOUNT OF GRANT PAID** ........................................... 15,000.
5. Calling the Funder

- Best way to get the most accurate information about a foundation is to call and chat with foundation director.
Introduction

• Introduce self and ask “May I ask you some questions that will clarify my understanding of your funding focus and determine if I have a good fit?”

• Introduce self and say “I believe our agency has a program that meets your foundation’s giving focus. May I speak to someone at your foundation and share the details with them?”
Funding Focus

• “To further clarify the funding priorities listed on your website, does your foundation have any particular funding focus within the posted funding priorities?”

• “Is there any particular funding focus that is of particular interest currently?”

• “Do you have a preference for established programs or shorter term projects?”

• “Does your foundation provide funding for_______________ (operating, capital, endowment, tech assistance)?”
Determining if Good Fit

• “What outcomes is your foundation expecting when evaluating potential awardees?”

• “Beyond what is posted on your web site, is there anything your review committee members look for when considering an application?”

• “Will your board consider applications from young nonprofits with a short history of funding?” (If this is an issue.)
Wrap Up

• “Could I interest you or someone on your staff to come for a site visit?

If conversation going well -

• Then introduce your agency to them (your 60” organizational elevator pitch)
• Then “pitch” your project / program and ask if they think it is a good fit.
VETTING CHECKLIST
Things to Consider When Evaluating a Funding Opportunity

☐ Is FUNDER ACCEPTING PROPOSALS at this time? If yes, keep going. No? Stop!

☐ Is there a LOI NEEDED PRIOR to full proposal that we can submit in time?

☐ Are you able to MEET THE DEADLINE? Can we prepare a well-written, compelling proposal in time to meet the funder’s submission deadline? (Note length and intensity of application)

☐ Will the GRANT BE AWARDED IN TIME? What is the grant making cycle and timeline?

☐ Are there REQUIRED START AND END DATES? Does my project fall within that time period?

☐ Is my organization and/or project located within the FUNDER’S GEOGRAPHIC GIVING AREA? (e.g. country, state, county)

☐ Do the FUNDER’S MISSION / PURPOSE ALIGN WITH THOSE OF MY ORGANIZATION?

☐ Is our ORGANIZATION ELIGIBLE TO APPLY? Is my organization or project still eligible after reading the funder’s limitations?

☐ Does the funder LIMIT THE PROPOSAL SUBMISSION in any way? If so, is this proposal allowed at this time? (e.g. political, religious, advocacy, capital, equipment, conferences, seed money, every 3 years)

☐ Does the funder give the TYPE OF SUPPORT you are looking for? (e.g. seed money, program development, general operating, conferences, publication, endowment, building, equipment)

☐ Does your PROJECT FALL WITHIN THEIR PROGRAM AREAS OR FIELDS OF INTEREST (funding focus)? Does the project address or advance priority area(s) identified by the funder?

☐ Does the PROJECT SCALE AND SCOPE SEEM TO ALIGN WITH PAST FUNDED PROJECTS or with those indicated as likely to be funded by the sponsor?

☐ Does the amount of money for which I will ask fall between the LOW AND THE HIGH FOR THE FUNDER’S GRANT-MAKING RANGE?

☐ Does the AVERAGE AWARD COINCIDE WITH YOUR ASK?

☐ How many awards are they giving out or what is the TOTAL AMOUNT THEY PLAN TO DISTRIBUTE?

☐ Is the number large enough that it makes sense to submit an application? If there is a MATCH REQUIREMENT? Do we have the match (cash, in-kind, etc.) available and can we document it?

☐ Are there TROUBLESOME RESTRICTIONS (e.g. use of funds, dissemination of the outcomes, ownership of materials produced)?

☐ Do we have the INFORMATION, DOCUMENTS AND APPROVALS NEEDED? (e.g. shovel ready, permits, environmental review)

☐ Do we have SUPPORTING DOCUMENTS READILY AVAILABLE? (e.g. 501 C 3 determination, board list with affiliations, 2 years of audits, a long enough list of recent funders, W9, balance sheet side by side fiscal years)

☐ Can we meet the REPORTING REQUIREMENTS for project progress and financial expenditures?

Congratulations! You appear to have a good potential funding source!
Finding Time to Vet

- 20 minutes each morning reading RFP e-blasts.
- 2hrs on Friday afternoons going through Grants.gov/Federal Register and your State’s upcoming government grants list.
- First day of the month spend 2 hrs calling your contacts at your state departments (e.g. Department of Health, Education) and ask about upcoming funding opportunities.
- First Friday of the month, spend 2 hrs calling potential funders you want to make relationships with.
- Do research when you need a “break” from a challenging application.
PND Alerts <PND_RFP@alerts.foundationcenter.org>

Today's RFPs from Philanthropy News Digest

PND RFP Alert Companies That Vet Well

http://foundationcenter.org/pnd/rfp/

Free

RFP e-blast

California Historical Society Accepting Proposals for Book Award
POSTED: JUNE 8, 2017
DEADLINE: JULY 1, 2017
A cash prize of $5,000 will be awarded for a manuscript that makes an important contribution to California historical scholarship and deepens public understanding of some aspect of the state’s history.

MORE »

Brooklyn Community Foundation Invites LOIs for Youth Success Programs
POSTED: JUNE 8, 2017
DEADLINE: JULY 7, 2017 (Letters of Interest)
Grants of up to $50,000 will be awarded to Brooklyn-serving nonprofit organizations for projects designed to increase young people’s social and economic success by expanding opportunities for positive youth development.

MORE »

New York Public Library Accepting Applications for 2018-19 Cullman Fellowships
POSTED: JUNE 5, 2017
DEADLINE: SEPTEMBER 29, 2017
Fellowships are awarded to academics, independent scholars, creative writers, and others whose work will benefit directly from access to the library’s collections in the Stephen A. Schwarzman Building at 42nd Street and Fifth Avenue.

MORE »

APF Accepting Applications for 2018 Visionary Grants
POSTED: JUNE 5, 2017
DEADLINE: APRIL 1, 2018
Grants of up to $20,000 will be awarded in support of research, education, and intervention-driven projects and programs that use psychology to solve social problems.

MORE »

View all RFPs »
GrantStation Insider - June 8, 2017

National Funding
Opportunities Throughout the U.S.

Support for Youth-Led Community Service Projects

Youth Service America and Disney are teaming up this summer to inspire kids and families to make a positive impact in their communities through the Disney Be Inspired Summer of Service campaign. Children and teens, ages 5 to 18, can apply for a $500 Disney Be Inspired Summer of Service Grant to create a project or expand an existing project using fun summer activities like sports, arts, reading, or being outdoors to make their communities healthier, greener, and stronger. This fall 250 youth-led service projects will be selected and $500 grants will be awarded to each winner’s sponsoring organization to support their projects. The registration deadline is September 15, 2017; applications will be accepted through September 30, 2017. Visit the YSA website to learn more about the program.

Weed Control Partnerships Funded

National Fish and Wildlife Foundation: Pulling Together Initiative

The Pulling Together Initiative, a program of the National Fish and Wildlife Foundation (NFWF), is intended to help local communities throughout the country promote the conservation of natural habitats by preventing, managing, or eradicating invasive and noxious plant species. This program provides grants to develop or advance Cooperative Weed Management Areas and Cooperative Invasive Species Management Areas. Priority will be given to projects that include partnerships with a wide cross-section of invasive species stakeholders including private landowners, local nonprofit organizations, state and local governments, and federal agencies. Grant awards will range from $10,000 to $100,000. All grants require a minimum 1:1 match of cash or in-kind goods and services from non-federal sources. Nonprofit organizations, government agencies, Indian tribes, and educational institutions are eligible to apply. Pre-proposals must be submitted online by July 13, 2017; full proposals are due September 19, 2017. Visit the NFWF website to review the Request for Proposals.

Grants Promote Children’s Health Programs

American Academy of Pediatrics: Community Access to Child Health Program

The Community Access to Child Health (CATCH) Program, a national initiative of the American Academy of Pediatrics, is designed to improve access to healthcare by supporting pediatricians who are involved in community-based efforts to enhance the health of children. CATCH Planning and Implementation Grants of up to $10,000 are awarded to pediatricians and fellowship trainees to plan innovative community-based child health programs that will ensure all children have medical homes, are properly immunized, and have access to healthcare services not otherwise available in their community. Grants of up to $2,000 are awarded to pediatric residents addressing the same issues. The application period will close on July 31, 2017. Visit the American Academy of Pediatrics’ website to learn more about the CATCH Program.

Organizations Advancing Justice for LGBTQ People Supported

Amos Foundation: U.S. Social Justice Programs

The Amos Foundation is dedicated to the idea that people can live in harmony with one another and the natural world. The Foundation’s U.S. Social Justice Program focuses on advancing social justice for LGBT people in the United States, with a significant focus on LGBT youth and communities of color. This program’s grantmaking focuses on the following three goal areas: 1) increased LGBT understanding and acceptance among youth and communities of color through culturally relevant messages and messengers; 2) strengthened leadership among activists working across movements or in alliances where LGBT issues are meaningfully integrated; and 3) increased social and economic protections for LGBT youth, with an emphasis on LGBT youth of color. U.S.-based nonprofit organizations may submit an online Initial Funding Concept form at any time. Visit the Foundation’s website for more information.
RFP Alert Companies That Vet Well

- Grant Gopher

Free RFP e-blast

http://www.grantgopher.com
RFP Alert Companies That Vet Well

- Grant Spy

Paid

$20.95 monthly

http://www.grantspy.com
RFP Alert Companies That Vet Well

• Youth Services Briefing

Free RFP e-blast

http://ysa.org/resources/briefing/
RFP Alert Companies That Vet Well

- Society for Nonprofits

Paid

$79 annual

https://www.snpo.org/publications/fundingalert.php
Miami Dade County grant e-blasts

Free RFP e-blast

http://www.miamidade.gov/grants/current-opportunities.asp
RFP Alert Companies That Vet Well

- GrantWatch

Paid
RFP e-blast

http://www.grantwatch.com
RFP Alert Companies That Vet Well

• CD Publications

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<td>Children &amp; Youth Funding Report - 12 months online</td>
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<td>Community Development Digest - 12 months online</td>
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<td>Federal &amp; Foundation Assistance Monitor - 12 months online</td>
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Paid

RFP e-blast

http://www.CDpublications.com

$35.5M Available for Teen Arts Programs

Private Funder: Surdna Foundation; Opportunity: 2017 Thriving Cultures Grants-Teens' Artistic and Cultural Advancement; Funding Focus: Education and the arts; Geographic Focus: National; Eligibility: Schools and nonprofits; Funding: Varies, generally in the $35,000 to $80,000 range (the foundation made $35.5 million in grants last year); Deadline: Rolling.

Summary: These grants support education and arts opportunities for teens. The foundation supports projects helping teens from many cultures contribute to the evolution of new art forms.

Surdna seeks programs that provide an unwavering institutional commitment to teens; offer young people increasingly complex and long-term opportunities to create art with accomplished artists; and provide experienced, faculty and guest artists who can introduce diverse cultural and contemporary art-making approaches.

The foundation recently gave $35,000 to the Mattress Factory (www.mattress.org), Pittsburgh, PA, for a program to provide teen artists with the opportunity and resources to work with professional artists to create installations and develop conceptual thinking.

It gave $170,000 to the Juvenile Justice Project of Louisiana (www.jjpl.org) for the New Orleans Youth Organizing Collaborative.

Other Funding

- The popular Surdna Arts Teachers Fellowship Program was renamed the Nat'l Arts Teacher Fellowship. It is on hiatus. Check the website at: http://natf-arts.org/
- The Artists Engaging in Social Change supports programs that help artists deepen the cultural understanding or help communities achieve social change. Awards range from $25,000 to $150,000; open to nonprofits and artists. It can be found here, http://tinyurl.com/obulcb

Info: http://tinyurl.com/CDP2a07r; 212/557-0010; grants@surdna.org (email).
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