



Pennsylvania
Association of
REALTORS®

The Voice for Real Estate®
In Pennsylvania

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PREF PROJECT GRANT GUIDELINES

Funding provided by the PA REALTORS® Education Foundation and its contributors

APPLICATION GUIDELINES

PREF administers a grant program for projects designed to benefit the Pennsylvania real estate industry and help PREF fulfill its mission:

The Pennsylvania REALTORS® Education Foundation enhances the professionalism and profitability of real estate licensees in the Commonwealth of Pennsylvania by funding and supporting industry research and the development of timely, relevant and practical educational tools and projects.

Please note that grant requests for under \$500 may be requested using the Mini-Grant application form.

Funds may not be used to pay for personnel, to replace state or local funds, or for “refreshments.” Grant requests for operating expenses or overhead will not be considered. Applicants should avoid asking for funds that can be found through other sources or that require a continuing commitment of funds beyond the original proposal.

PREF requires a final report on the results of the project be submitted to the Foundation within 30 days of completion of the project.

WHO MAY APPLY

Grants are available to individuals, organizations, or associations with a demonstrated success in providing the type of program, project or service for which they are seeking funding. Documentation of any other current or pending source(s) of funding for the project must be provided at time of application.

APPLICATION PROCESS

To apply, complete the following application and submit it to PREF by mail or e-mail. Please write or type your responses directly onto the form. Provide sufficient information to enable the PREF Grant Award Selection Task Force to have a clear understanding of your project. Address questions to Samantha Neely at sneely@parealtor.org.

SUBMITTING AN APPLICATION

Proposals, including application and budget, must not exceed three pages. Limit one application per project. Applicants will be notified of a decision within 90 days of application deadlines. If approved, applicants should receive funds within 30 days.

After completing the application, please e-mail it to: sneely@parealtor.org with the subject line "PREF Grant Application" or mail to:

PREF
Attention: Samantha Neely
500 North 12th Street
Lemoyne, PA 17043-1213

Introduction

PREF created this Grant Application to simplify the process of requesting and making foundation grants. The Grant Application is designed to benefit you, the grantseeker, and the foundation decision-makers who review, evaluate and act on the grant proposals you submit.

What it is

The Grant Application is a proposal format. PREF uses this format when nonprofit organizations and others apply to them for funding. The format should be used as an outline and guide for organizing your grant proposals.

How it benefits you

Even though foundations ask for the same type of organization and financial data, each has had its own forms or format for grant applications. By providing an orderly, consistent arrangement of proposal elements, the Grant Application provides a structured format to assist you in writing effective proposals. The Grant Application solicits the type of information PREF needs to evaluate your request in a way that makes it easy to read and digest. This should enable you to focus on the content of your proposal rather than the form. The logical order of the Grant Application invites a clear, concise communication of the unique character and merits of your organization or project. It encourages you to build a case for your request that will enlighten foundation directors, and assist them in making well-informed decisions on grant applications.

How to use the Grant Application

Please read this whole document before you begin to use the Grant Application. Pay close attention to the Suggestions for Preliminary Preparation. Remember, the Grant Application is not a form. As long as the narrative flows in the designated order under the designated headings and subheadings, you can feel free to include all of the information you feel is important to make your case. It is necessary, however, that you address the applicable questions in every category. There is one exception. Each proposal must include a completed copy of the Grant Application Cover Sheet.

The final product

A completed grant application and proposal should include two components: the cover letter (which is different than the Grant Application Cover Sheet) and the proposal itself. The proposal should contain, in the following order:

- ❖ Grant Application Cover Sheet
- ❖ Executive Summary

- ❖ Narrative (outlined in the Grant Application)
- ❖ Attachments (outlined in the Grant Application)

Suggestions for Preliminary Preparation

1. Be clear about your organization's priorities and your purpose in seeking funds.
2. Make sure the purpose of your proposal fits within PREF's guidelines concerning the types of programs that are eligible for funding and the geographic area to be served. A misplaced proposal may undermine your credibility.
3. Include in your proposal a one-page cover letter that conveys in simple terms the following information:
 - ❖ Name of the program/project
 - ❖ The program or project's purpose
 - ❖ A strategic reason for PREF to fund the program
 - ❖ Amount requested
 - ❖ Time period of the program or project
 - ❖ Name of the contact person
4. The letter should be signed by the board president or chairperson and the executive director. (If your proposal is a collaborative request, signatures of participating organization representatives must be provided.)
5. Include a one- or two-page Executive Summary of the project. The Executive Summary should focus on the major points of the proposal, including a brief description of the proposed project, whom it serves, why it's important and why your organization should receive the funds to implement it. The Executive Summary should excite and inspire the reader to review your full proposal. It should also provide the essential information, in a concise manner.
6. Anticipate PREF's concerns. If a question is not applicable, explain; if a problem exists that might detract from the credibility of your organization or project, address it briefly, but do not dismiss it.
7. Submit the number of copies PREF requests. Do not send videotapes or unsolicited information.



PREF GRANT APPLICATION

Date of Application _____

Legal Name of Organization Applying: _____
(Should be the same as on IRS determination letter and as supplied on IRS Form 990)

Year Founded: _____ Current Annual Operating Budget: _____

Federal Tax ID# _____

Executive Director: _____

Contact Person/Title
(if different from Executive Director): _____

Address _____

City _____ State _____ Zip _____

Phone(s) _____ Fax _____

Website URL: _____

Email (of contact person): _____

Project Name: _____

Purpose of Grant (one sentence): _____

Beginning and Ending
Dates of Project: _____

Amount Requested: \$ _____ Total Project Cost: \$ _____

Are you currently applying for and/or receiving funding for the project from another source? If so, identify source and amounts below:

_____ \$ _____

_____ \$ _____

Geographic Area in PA Served: _____

Signature:
Board of Directors Chairperson (if applicable): _____ Date: _____

Typed Name and Title: _____

Signature: Executive Director: _____ Date: _____

Typed Name and Title: _____

Common Grant Application Format

Please structure your proposal to provide the following information in the order indicated. Use the headings and subheadings provided. Then, in your own words, address the questions and issues posed in the outline. The questions reflect the general interests and concerns of PREF, but are not intended to be conclusive. Additional information pertinent to your project should be included. Please be thorough, yet strive for brevity. Although tightly written proposals are preferred, take the space you need to make your case.

A. NARRATIVE

1. Organization information

- ❖ Summarize your organization's history.
- ❖ State your mission and goals, future challenges, and long-range plans.
- ❖ Outline current programs and activities.
- ❖ Highlight accomplishments.

TIP: Differentiate yourself from similar or competing organizations

2. Purpose of Grant

- ❖ Describe the proposed program or project.
- ❖ Identify the needs/problems to be addressed, target population and number of people to be served by the project.
- ❖ Describe the project goals and objectives, and your plan to meet them.
- ❖ Define the project as a new or continuing program.
- ❖ Identify other organizations, partners or funders participating in the project and their roles.
- ❖ Provide a timetable for implementation.
- ❖ Identify long-term funding resources.

TIP: If a similar program or service has been conducted by your organization or another, please discuss its impact. Does it represent an expansion or duplication of services in your area? If it doesn't, define its potential to serve as a model program locally or nationally.

3. Evaluation

- ❖ Describe your plan to document progress and results. Interim and final evaluation and expenditure reports will be required for every grant awarded.

TIP: Set measurable goals for the program and specify your plans to communicate with the foundation during the grant period.

B. ATTACHMENTS

Please include the following attachments in the order indicated:

1. Copy of the current IRS determination letter indicating 501 (c)(3) tax-exempt status.
2. Statement verifying payroll tax payments.

3. Organizational structure, including:
 - ❖ List of officers and directors, including occupations, places of employment, and relevant affiliations
 - ❖ Description of board responsibilities, including committee assignments
 - ❖ Resumes and/or job descriptions of key personnel involved in the project
4. Finances, including:
 - ❖ Grant budget
 - ❖ List of other funders, potential funders and amounts committed or requested, including public contracts, individual contributions and other sources of income supporting the project
 - ❖ Current board-approved annual operating budget, including expenses and income
 - ❖ Most recent audited annual financial statement
5. Letters of support (optional) that substantiate need for the project and collaboration with other organizations
6. Annual report, if available

Grant Application Budget

An accurate, detailed budget for proposed projects is a primary requirement of every grantmaker. This portion of your proposal should break down the total budget into the specific items listed below. A narrative description explaining unusual budget items and, if applicable, the percentage of “overhead” applied to the project should precede the itemized listing. “In-Kind” expenses and donations or matching funds should also be spelled out. As long as your budget is typewritten and contains the following information, feel free to submit it in a format comfortable and convenient for you.

A. TIME FRAME *Please specify the budget period (e.g., January 1, 2007 to December 30, 2007).*

B. EXPENSES *Please itemize the following expenses. Be sure to include any additional items relevant to your particular program. Provide an expense total.*

- ❖ Salaries and wages by individual position, specifying full- or part-time positions
- ❖ Payroll taxes
- ❖ Fringe benefits and related fees
- ❖ Consultant and professional fees (e.g., accounting, legal, etc.)
- ❖ Travel
- ❖ Equipment
- ❖ Supplies
- ❖ Printing and copying
- ❖ Telephone and fax
- ❖ Postage and delivery
- ❖ Rent
- ❖ Utilities
- ❖ In-kind expenses

❖ TOTAL EXPENSES

C. INCOME *Please include all confirmed and anticipated sources of revenue, and indicate their status. Provide an income total.*

- ❖ Government grants and contracts
- ❖ Foundations
- ❖ Corporations
- ❖ Earned Income
- ❖ United Way, Combined Federal Campaign or other federated campaigns
- ❖ Individual contributions
- ❖ Fundraising events and product sales
- ❖ Membership income
- ❖ In-kind support
- ❖ Additional revenue
- ❖ TOTAL INCOME

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2. Statement verifying payroll tax payments
3. Organizational structure, including:
 - ❖ List of officers and directors, including occupations, places of employment, and relevant affiliations
 - ❖ Description of board responsibilities, including committee assignments
4. Financial information, including:
 - ❖ List other foundation and corporate funders and the amounts committed or requested. Include all public funds and individual contributions supporting the project.
 - ❖ Current board-approved annual operating budget, including expenses and income.
 - ❖ Most recent audited annual financial statement
5. Letters of support (optional) that substantiate need for the project/program and collaboration with other organizations
6. Annual report, if available