

# The Bunbury Fund

---

Grant Information Session

February 21, 2019

# Agenda

---

1. Introductions
2. Presentation on *The Bunbury Fund* and *Capacity Building*
3. Q and A

# Bunbury Fund Overview

---

- ***Donor Advised Fund*** - of the Princeton Area Community Foundation, created from the assets of the Bunbury Company.
- ***Six Bunbury Fund Advisors*** oversee grant making and are supported administratively by Community Foundation staff.
- ***Capacity Building*** concentrates grant resources on work we see as pivotal to organizational effectiveness.

# 2018 Grant Making Dashboard

Applications	Outcome
Proposals Received	58
Proposals Reviewed	44
Declined	20
Approved	15
Site Visits	10
Total Commitments	\$430,000

Grant Category	Average Grant
Planning Grant	\$5,000
One-time Capacity Grant	\$30,584
Multi-year Capacity Grant	\$100,000

# What is Capacity Building?

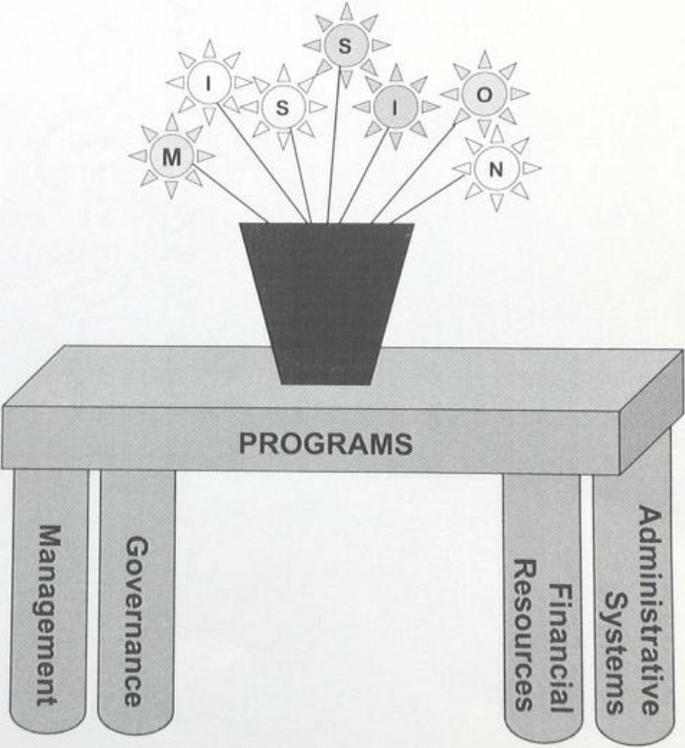
---

...whatever is needed to bring a nonprofit to the next level of operational, programmatic, financial, or organizational **maturity**, so it may more effectively and efficiently advance its mission into the future. Capacity building **is not a one-time effort to improve short-term effectiveness**, but a continuous improvement strategy toward the creation of a sustainable and effective organization.

*National Council of Nonprofits*

# Capacity: a visual

Strengthening the organizational platform which supports and sustains a nonprofit's mission and programs



Copyright © 2001 Susan Kenny Stevens, Ph.D.  
Excerpted from the book *Nonprofit Lifecycles: Stage-based Wisdom for Nonprofit Capacity*. All rights reserved.

# Key Elements of Capacity Building

---



# Why is it important?

---

It's about the **nonprofit's ability to deliver its mission effectively now, and in the future.** Capacity building is an investment in the effectiveness and future sustainability of a nonprofit.

*National Council of Nonprofits*

# Benefits to the Grantee

---

Targets specific needs that are difficult to fund.

Opportunity to step back, reflect and plan forward.

Helps set the stage for organizational growth.

Outsourced assistance is objective.

# Key: Building Trust

---

**Grantees often limit their capacity building needs to fundraising** support so that they can expand their reach and do not mention other issues that they fear the foundation will perceive as concerns in relation to future funding.

*Cindy Rizzo, evaluation and strategy senior advisor at the Arcus Foundation*

*From Grantmakers for Effective Organizations (GEO) Report, Strengthening Nonprofit Capacity*

# Bunbury Fund: What we fund

---

- **Strengthening governance, leadership or staff expertise**
- **Executive transition and succession planning**
- Collaborating with other organizations to improve services or eliminate duplication
- Pursuing opportunities to share space, equipment, or other administrative costs, or merge
- Organizational assessment including strategic planning
- Restructuring business models and accounting practices to improve financial stability
- Leadership development and training
- Acquiring or improving impact measurement tools and program evaluation capacity
- Enhancing technology (excluding routine upgrades)
- Refining communications, marketing and outreach
- Improving volunteer recruitment, training and engagement

# Types of Grants

---

- Planning Grants up to \$10,000
- One-time Grants up to \$50,000
- Multi-year Grants up to \$150,000

*All awarded grants will include an additional 10% for overhead costs.*

# Eligibility Criteria

---

- Tax-exempt status under Section 501 (c) 3 of the Internal Revenue Service Code, be a publicly supported charity under Section 509, and be registered with the State of New Jersey as a charity.
- Programs that operate and impact audiences within the geographic region of Community Foundation.

# What We Do Not Fund

---

- Operating support (including existing staff salaries)
- Building renovations, new facility construction and any type of capital or endowment campaign
- Fundraising appeals or sponsorships
- Scholarships
- Field trips or sports activities
- Lobbying and other political activities
- Fraternal and religious activities
- Tax-supported and government-operated basic programs and services, such as core curricular school activities, and essential police and fire services

# On-Line Application

## 2-Page Project Summary:

Single sentence statement on use

The Need

Fit with strategic plan priorities

Readiness

Outcomes

Board and staff commitment

Action plan and Timeline

## Attachments:

Financials – Audit and Budget

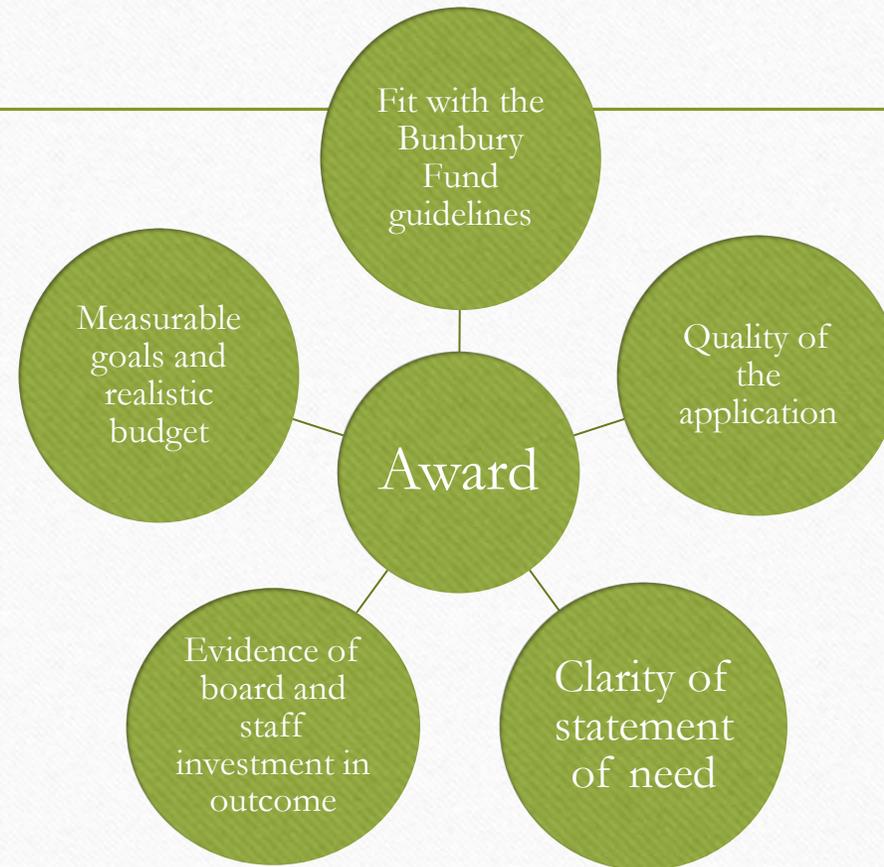
Current board members

Profiles of relevant staff members  
AND consultants

Organization funding over \$1,000

Strategic Plan

# Selection Criteria



# Additional Information

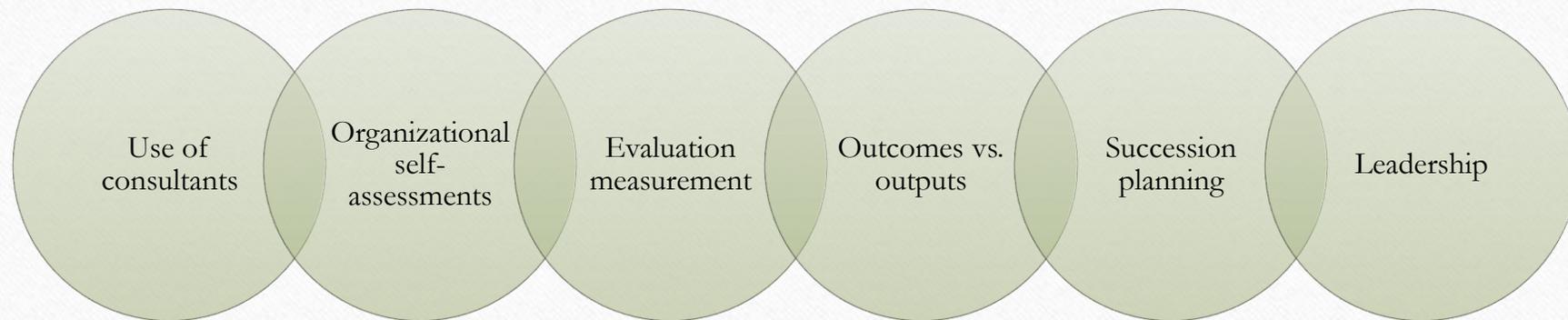
---

- ***Site Visits*** – Should include both board and staff leadership.
- ***Decisions*** - Within three months of submission.
- ***Accountability*** - Year-end reports required for all grantees and annual meetings for multi-year grantees and advisors.
- ***Reapply*** – One year after initial notice, except planning grants.
- ***Consultants*** - Research the right consultant for your needs.

# Additional Resources:

[www.councilofnonprofits.org](http://www.councilofnonprofits.org)

---



# Thank you!

---

For any further discussion about timing, process or  
application submission:

Nelida Valentin [nvalentin@pacf.org](mailto:nvalentin@pacf.org)