



*Touching Lives*



**NINA MASON PULLIAM**  
CHARITABLE TRUST

Building a Legacy of Community  
Grantmaking since 1998

# *2010 Grant Application Guidelines*

HELPING PEOPLE IN NEED. PROTECTING ANIMALS AND NATURE  
ENRICHING COMMUNITY LIFE IN INDIANAPOLIS AND PHOENIX

### ***History of the Trust***

The Nina Mason Pulliam Charitable Trust was established upon the death of Nina Mason Pulliam on March 26, 1997, to support for 50 years the causes she loved in her home states of Arizona and Indiana. For more information about Mrs. Pulliam, please visit the Trust's web site at [www.ninapulliamtrust.org](http://www.ninapulliamtrust.org)

### ***Mission***

The Nina Mason Pulliam Charitable Trust seeks to help people in need, especially women, children and families; to protect animals and nature; and to enrich community life primarily in metropolitan Phoenix and Indianapolis.

### ***Geographic priorities***

In keeping with the wishes of Mrs. Pulliam, the Trust accepts requests only from charitable organizations located in and serving the metropolitan areas of Indianapolis, Indiana and Phoenix, Arizona, with the exception of environmental requests. For environmental requests, the Trust will consider proposals from charitable organizations throughout Arizona and Indiana.

### ***What the Trust will and will not consider funding***

The Trust makes grants only to tax-exempt organizations whose purposes are described in Section 501(c)(3) of the Internal Revenue Code that are either public charities described in Sections 509(a) or private operating foundations described in Section 4942(j)(3).

The Trust will not consider grants for international activities, academic research, sectarian purposes, programs that promote religious doctrine or political campaigns. Also, the Trust does not make grants to individuals.

The Trust will not accept unsolicited proposals from colleges and universities for operating or capital requests. (The latter includes endowments for professorial chairs, faculty training and research, scholarships, and building campaigns.) However, the Trust will continue to accept proposals through its regular grant cycles for support of projects that link higher education institutions to their communities.

### ***Scope of funding and type of support***

Generally, the Trust prefers to disburse funds as a one-year grant but not for a period longer than three years. Requests for funding are limited to one request per organization per calendar year. This includes the Summer Youth Program Fund. For these purposes, an "organization" generally refers to that entity to which the IRS has issued a Section 501(c)(3) determination letter. **If an organization received a previous grant, a final evaluation report must be submitted and reviewed by Trust staff prior to requesting another grant.** For more detailed information and examples, please refer to the Question and Answer section posted on our web site at [www.ninapulliamtrust.org](http://www.ninapulliamtrust.org).

The Trust awards grants for programs and capital needs. **For 2010 the Trust will not accept proposals for capital campaigns, either for building or endowment purposes.** The Trust will consider grants for overall operating support to stabilize management and finances of organizations that have been in existence for three years or less or for established organizations that can document major changes in income generation that threaten their future existence.

## ***Program areas***

The Nina Mason Pulliam Charitable Trust provides grants that focus on the areas of service Nina Pulliam supported during her lifetime:

### ***Helping People in Need***

- ***Basic Needs*** – The Trust supports organizations and programs that serve those who are without sufficient food, clothing, shelter, medical care and other necessities of life.
- ***Elderly Persons*** – The Trust supports organizations and programs that assist elderly adults and preserve their mental and physical well-being and independence.
- ***Physically and Developmentally Disabled Adults and Children*** – The Trust supports organizations and programs that provide services for people with physical and developmental disabilities.
- ***Women, Children, Youth and Families*** – The Trust supports organizations and programs that improve the well-being of and future opportunities for children, youth and their families. This also includes programs that provide health and educational services.

Organizations requesting funds for summer youth programs in Arizona and Indiana must do so through the Summer Youth Program Fund administered by the Arizona Community Foundation and the Central Indiana Community Foundation, respectively. Please refer to the Trust's web site for additional information.

### ***Protecting Animals and Nature***

- ***Animal Welfare*** - The Trust supports organizations and programs that strengthen community bonds and provide humane services for domestic animals, including shelters and veterinarian and adoption services. It also supports organizations providing rescue, veterinary care and reintroduction of native wildlife.
- ***Botanical Gardens and Zoos*** - The Trust supports organizations and programs that provide education and recreation opportunities for the community and that protect the diversity of animals and their habitats.
- ***Environment*** - The Trust supports organizations and programs that provide conservation, protection and restoration of wildlife and its habitats, as well as education and public awareness to promote environmental stewardship.

### ***Enriching Community Life***

- ***Arts and Culture*** – The Trust supports arts and cultural organizations whose programs are primarily for children and adults who also are most likely to be served by the Trust's "Helping People in Need" program area.
- ***Community Building and Civic Revitalization*** – The Trust supports organizations and programs that assist neighborhoods in decline, as well as those that enhance the quality of life in the Trust's priority communities of Indianapolis and Phoenix.

## ***Proposal consideration process***

The Trust approaches the funding process in two steps.

The Trust invites organizations that support its mission and eligibility guidelines to submit a preliminary proposal. Organizations may submit requests for funding at any time throughout the year. However, proposal review and funding decisions occur three times per year. See Funding Cycle Deadlines.

**Step 1: Preliminary Proposal.** Proposals may be submitted in hard copy format or online at [www.ninapulliamtrust.org](http://www.ninapulliamtrust.org) (See instructions for submitting a preliminary proposal.)

**Step 2: Full Proposal/Application for Funding.** Organizations whose preliminary proposals are approved for full proposal consideration will receive notification and application instructions. Materials required in the full proposal include an 8-page narrative addressing provided questions, detailed budget information and supplemental documents that include the IRS 990 form, strategic plan and financial statements. The Trust then will schedule a meeting or site visit with representatives of the Trust and the applicant's chief executive and board chair or other officer of the board.

**Please note: The invitation to submit a full proposal does not guarantee selection as a grantee.**

### **Submitting a preliminary proposal**

The preliminary proposal must include the following:

- Application Form (4 copies – if not submitting online)
- Preliminary Proposal Letter (not to exceed three pages with print size of 12-point font) describing the project (4 copies – if not submitting online)
- Board of Directors roster with position held. Please include business affiliation, as well as city and state (4 copies – if not submitting online)
- IRS 501(c)(3) Determination Letter (1 copy)

For both program and capital requests, attach a list of other support already received and/or pledged for this project (including sources and amounts). **No additional materials are to be submitted.**

If submitting a hard copy proposal, the *Preliminary Proposal Letter* must be submitted on the organization's letterhead and signed by both the chief executive officer (e.g. president, CEO, executive director) and the board chair or other officer of the board.

The letter must include the following:

- a brief description of your organization
- a clear description of the need your request is intended to address, including the time frame and budget of your request
- a description of the target population and how it will benefit

Preliminary proposals will be accepted on or before the due date. The Trust appreciates those organizations that submit prior to the deadline. **Organizations that have never received a Trust grant are required to speak with a grants programs staff person prior to submitting a preliminary proposal.** The Trust strongly suggests that former grantees also contact a grants programs staff person prior to submitting a preliminary proposal.

All materials must be received no later than 3:00 p.m. the day of the deadline. The Trust makes no exceptions.

- Please do not bind the materials or place in a notebook.
- The Trust will not process an incomplete application and/or multiple applications in the same year.

*Funding cycle deadlines*

<b>Preliminary Proposal Deadline</b>	<b>Notification Regarding Preliminary Proposal</b>	<b>Full Proposal Deadline</b>	<b>Notification Regarding Full Proposal</b>
January 7, 2010	February 26, 2010	March 17, 2010	June 30, 2010
May 5, 2010	June 30, 2010	July 15, 2010	October 29, 2010
September 7, 2010	October 29, 2010	November 17, 2010	February 28, 2011

***Where to submit preliminary proposals***

Indiana organizations (including national organizations whose projects will benefit Indiana) are to submit proposal packages to:

**Grants Administration  
Nina Mason Pulliam Charitable Trust  
135 N. Pennsylvania Street, Suite 1200  
Indianapolis, IN 46204**

Arizona organizations (including national organizations whose projects will benefit Arizona) are to submit proposal packages to:

**Grants Administration  
Nina Mason Pulliam Charitable Trust  
2201 E. Camelback Road, Suite 600 B  
Phoenix, AZ 85016-3442**

All organizations submitting online preliminary proposals should do so at [www.ninapulliamtrust.org](http://www.ninapulliamtrust.org).



**NINA MASON PULLIAM**  
CHARITABLE TRUST

Building a Legacy of Community  
Grantmaking since 1998