



Community Relations
100 Crystal A Drive
Hershey, PA 17033
Phone: 800-468-1714

The Hershey Company Common Funding Application

The Hershey Company has adopted a *Common Funding Application* to streamline the process of making funding decisions. The *Common Funding Application* is a proposal format that solicits the information we need to evaluate your request in an efficient and timely manner.

The *Common Funding Application* contains guidelines and worksheets for the following types of requests:

- General funding
 - Non-arts organizations
 - Arts organizations
- Capital campaign funding

Please be sure to use the format best suited for your organization.

HOW TO USE THE COMMON FUNDING APPLICATION

Please read all of the information before you begin to use the Common Funding Application. Remember that the *Common Funding Application* is not a form. As long as the narrative flows in the designated order under the designated headings and subheadings, you may include any information you feel is important to make your case. It is necessary, however, that you address all applicable questions in every category. Your proposal should include a completed copy of the *Common Funding Application Cover Sheet*.

Please note: there are separate formats for program funding and capital campaign funding.

The Final Product

A completed application and proposal should include the following items in the following order:

1. *Common Funding Application Cover Sheet*
2. Executive Summary
3. Narrative (outlined in the *Common Funding Application*)
4. Attachments (outlined in the *Common Funding Application*)

Submitting Your Proposal

Organizations located in communities in which The Hershey Company has manufacturing operations should direct requests for funding to the management of the local Hershey facility in their geographic area, as follows:

Robinson Plant
Hershey Chocolate & Confectionery Corp.
1401 West Main Street
Robinson, IL 62454

Hazleton Plant
The Hershey Company
Humboldt Industrial Park, P.O. Box 340
Hazleton, PA 18201-0340

The Hershey Company
Community Relations
100 Crystal A Drive, P.O. Box 810
Hershey, PA 17033-0810

Y&S Candies
400 Running Pump Road
Lancaster, PA 17603-2269

Reading Plant
The Hershey Company
200 North 8th Street
Reading, PA 19612-5087

Memphis Plant
The Hershey Company
975 Kansas Street
Memphis, TN 38106

Stuarts Draft Plant
Hershey Chocolate of Virginia, Inc.
120 Harold Cook Drive
P.O. Box 1028
Stuarts Draft, VA 24477

Hershey do Brasil LTDA
Rodovia Raposo Tauares, KM63
18130-000 Sao Roque SP Brasil

Hershey Mexico
Carretera Guadalajara
El Castillo Km. 8.05
El Salto, Jalisco, C.P. 45680
Mexico

SUGGESTIONS FOR PRELIMINARY PREPARATION

1. Be clear about your organization's priorities and your purpose in seeking funds
2. Be sure the purpose of your proposal fits within The Hershey Company's guidelines describing the types of programs that are eligible for funding and the geographic area to be served. Programs that are eligible for funding include non-profit organizations which support:

- Arts & Culture
- Civic & Community
- Education
- Environmental
- Health & Human Services

3. Please adhere to the "Do's" and "Don'ts":

Do's

- A. Include a statement of the organization's objectives
- B. Provide a concise description of proposed use and primary objectives of the grant
- C. If applicable, include a summary of how the grant will improve the quality of life in a community where The Hershey Company has a manufacturing facility
- D. Provide a brief history of the organization's achievements

Don'ts

- A. The following are **not** eligible for grants:
 - Organizations without an Internal Revenue Code (501(c)(3) nonprofit, tax-exempt status
 - Individuals
 - Organizations outside the immediate areas of The Hershey Company's manufacturing facilities, with the exception of national and state-wide organizations whose programs complement The Hershey Company's funding priorities
 - Political campaigns, political or lobbying organizations or those supporting the candidacy of a particular individual
 - Churches or religious organizations, including seminaries, Bible colleges and theological institutions
 - Fraternal organizations
 - Labor organizations
 - Member agencies of United Way of the Capital Region, Central Pennsylvania (Cumberland, Dauphin and Perry Counties), and United Way of Lebanon County, Pennsylvania. *Exception: requests for capital campaign funding will be considered.*
 - Affiliate organizations of the Allied Arts Fund in Central Pennsylvania. *Exception: requests for capital campaign funding will be considered.*
- B. Do not send videotapes or unsolicited information

3. Adhere to the guidelines of the *Common Funding Application* so your proposal is not delayed during the review process. If a question is not applicable, explain. If a problem exists that might detract from the credibility of your organization or project, briefly address it but do not disregard it.
4. Include an Executive Summary of the project. The Executive Summary should focus on the major points of the proposal, including a brief description of your organization, the proposed project, whom it services, why it is important and why your organization should receive the funds to implement it.
5. Include an Evaluation of the project. Please explain how you will measure the effectiveness of your activities. Describe your criteria for a successful program and the results you expect to reach.

COMMON FUNDING APPLICATION

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. Additional information pertinent to your project should be included. Although condensed proposals are preferred, take the space you need to make your case.

APPLICATION

Please complete the *Common Funding Application Cover Sheet* found in the Forms Section.

TABLE OF CONTENTS

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, or indicate how you provide one piece of a whole program.

2. Purpose of Project

- ✓ Describe the proposed program or project.
- ✓ Provide documentation that demonstrates the need for the proposed program.
- ✓ Describe the 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 related to goals and objectives. A final evaluation and expenditure report will be required for every project funded.
- ✓ Be sure to list the anticipated outcomes of the project as well as the data sources and data collection methods to be used to obtain outcome indicators. Quantifiable, measurable results will enhance and strengthen your proposal.

COMMON FUNDING APPLICATION - CONTINUED

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. Organizational structure, including:
 - ✓ List of officers and directors.
3. Financial information, including:
 - ✓ Program budget (refer to the *Project Budget* in the Forms Section).
 - ✓ Current board-approved annual operating budget (refer to the *Organizational Budget* in the Forms Section).
 - ✓ List of other funders, potential funders and amounts committed or requested, including public funds, individual contributions and other sources of income supporting the project (refer to Forms Section).
 - ✓ Most recent audited annual financial statement.
4. Letters of partnership that substantiate need for the proposed project and collaboration with other organizations (maximum of 5).
5. Names of employees of The Hershey Company who are board members or volunteer with your organization.

COMMON FUNDING APPLICATION BUDGET

An accurate, detailed budget for proposed projects is a primary requirement of every funder. 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 also should be described.

A. HEADING

Please specify the budget period, e.g., January 1, 2000 – December 31, 2000.

B. EXPENSES

Please itemize expenses. Be sure to provide any additional items relevant to your particular program. Provide an expense total.

1. See Organizational Budget Format.
2. See Project Budget Format.

C. INCOME

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

1. See Organizational Budget Format.
2. See Project Budget Format.

COMMON FUNDING APPLICATION CAPITAL CAMPAIGN

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. Additional information pertinent to your particular capital campaign should be included. Although condensed proposals are preferred, take the space you need to make your case.

A. TABLE OF CONTENTS

B. NARRATIVE

1. Organization information

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

TIP: Differentiate yourself from similar or competitive organizations.

2. Purpose of capital campaign

- ✓ Describe the proposed campaign, including goals and objectives.
- ✓ Provide documentation that demonstrates the need for the proposed program, target population and number of people to be served by the project.
- ✓ Define the campaign as new or continuing.
- ✓ Identify other participating organizations in the project and their roles.
- ✓ Provide a timetable for implementation and completion.
- ✓ List the campaign leadership and their affiliations.
- ✓ Identify regulatory approvals, if required.
- ✓ Discuss implications of this campaign in relation to the organization's ongoing operational expenses.

TIP: If timing is a critical success factor or a "window of opportunity" exists that affects the success of your capital campaign, please elaborate.

3. Evaluation

- ✓ Describe your plan to document progress and results.

TIP: Set measurable goals for the programs.

COMMON FUNDING APPLICATION CAPITAL CAMPAIGN - CONTINUED

C. 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. Organizational structure, including:
 - ✓ List of officers and directors
3. Financial information, including:
 - ✓ Capital campaign budget.
 - ✓ Describe your fund raising strategy by donor categories; list other foundation and corporate funders and the amounts committed or requested. Include all public funds and individual contributions supporting the project. Specify the amount to be raised from your board.
 - ✓ Current board-approved annual operating budget, including expense and income.
 - ✓ Most recent audited financial statement.
4. Letters of support (optional) that substantiate need for the campaign and collaboration with other organizations.
5. Annual report, if available.
6. Summary of most recent capital campaign, outlining the campaign goal, amount raised, board contributions and beginning and ending dates.

COMMON FUNDING APPLICATION COVER SHEET

Date of Application: _____

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

Year Founded: _____ Current Annual Operating Budget: \$ _____

Executive Director: _____

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

Phone of Contact Person: _____

Address (principal/admin. office): _____

Mailing Address (if different from above): _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Fax: _____

E-Mail: _____ Web Site: _____

Project Name: _____

Purpose of Project (one sentence): _____

Beginning and Ending Dates of Project/Campaign: _____

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

Geographic Area Served: _____

Signature – Board of Directors Chairperson: _____ Date: _____

Typed Name and Title: _____

Signature – Executive Director: _____ Date: _____

Typed Name and Title: _____

PROJECT BUDGET

Project Dates From _____ To _____

	Amount Requested of The Hershey Co.	Other Funders' Amounts <i>(Please list other funders on the separate form provided)</i>	Total Amount <i>(Should equal preceding columns)</i>
REVENUE			
Gov't Grants/Contracts			
United Way			
Foundations			
Earned Income/Membership Income			
Unearned Income			
Corporations			
Fund raising Events/Ticket Sales			
In-Kind Support			
Individual Contributions			
Permanently Restricted Asset Income			
Other (Specify)			
TOTAL REVENUE			
EXPENSES			
Personnel			
Salaries			
Payroll Taxes			
Health Benefits			
Pension			
Contract Workers			
Other (Specify)			
Subtotal Personnel			
Operations			
Rent/Mortgage			
Utilities			
Telephone/Fax			
Insurance			
Office Supplies			
Program Supplies			
Maintenance Supplies			
Postage & Delivery			
Professional Service Fees			
Training & Development			
Consultant Fees			
Travel			
Printing & Copying			
Repairs & Maintenance			
Equipment			
Depreciation			
Other (Specify)			
Subtotal Operations			
TOTAL EXPENSES			

ORGANIZATIONAL BUDGET

Fiscal Year Beginning _____ Ending _____

	Proposed Budget	Current Budget	Previous Year's Budget
REVENUE			
Gov't Grants/Contracts			
United Way			
Foundations			
Earned Income/Membership Income			
Unearned Income			
Corporations			
Fund Raising Events/Ticket Sales			
In-Kind Support			
Individual Contributions			
Permanently Restricted Asset Income			
Other (Specify)			
TOTAL REVENUE			
EXPENSES			
Personnel			
Salaries			
Payroll Taxes			
Health Benefits			
Pension			
Contract Workers			
Other (Specify)			
Subtotal Personnel			
Operations			
Rent/Mortgage			
Utilities			
Telephone/Fax			
Insurance			
Office Supplies			
Program Supplies			
Maintenance Supplies			
Postage & Delivery			
Professional Service Fees			
Training & Development			
Consultant Fees			
Travel			
Printing & Copying			
Repairs & Maintenance			
Equipment			
Depreciation			
Other (Specify)			
Subtotal Operations			
TOTAL EXPENSES			

ORGANIZATIONAL BUDGET - INCOME

	Proposed Budget	Current Budget	Previous Year's Budget
REVENUE			
Admissions, Ticket Sales			
Subscriptions			
Membership Fees			
Contracted Services			
Tuitions/Class & Workshop Fees			
Sales (Shop, Souvenirs, Programs)			
Food/Beverage Concessions			
Space Rental			
Interest Earnings			
Permanently Restricted Assets Income			
Advertising			
Other (specify on separate form)			
TOTAL EARNED REVENUE			
CONTRIBUTED SUPPORT			
Government			
National Endowment for the Arts			
Federal			
State			
County			
Municipal			
Other (specify on separate form)			
Sub-Total Gov't Support			
Private			
Foundations			
Corporate			
Individuals – Board Members			
Individuals – All Others			
Parent Organization			
Special Fund Raising Events (gross)			
Income From Support Groups			
Other (specify on separate form)			
Sub-total Private Support			
TOTAL CONTRIBUTOR SUPPORT			

ORGANIZATIONAL BUDGET - EXPENSES

	Proposed Budget	Current Budget	Previous Year's Budget
Organizational			
Payroll – Administrative Employees			
Taxes – Social Security Employer Match			
Taxes – State Unemployment Match			
Taxes – All Other			
Admin. Contractual Fees (legal and acting)			
Employee Benefits			
Loan Payments (excluding mortgages)			
Office Equipment (purch., lease, maint.)			
Insurance (other than personnel or exhib.)			
Telephone and Postage			
Travel			
Misc. Office Expenses/Supplies			
Debt Relief/Cash Reserve			
Other (specify on separate form)			
TOTAL ORGANIZATIONAL EXPENSE			
Programming/Production			
Payroll-Artistic Staff			
Mounting Production (excl. artist fees)			
Contractual Artists' Fees			
Other Contractual Fees			
Mounting/Renting Exhibitions			
Transportation/Touring Costs			
Insurance-Exhibitions Only			
Equipment (purch., lease, maint.)			
Acquisitions/Permanent Arts Collection			
Marketing, Subscription, Promotion			
Printing/Publications/Advertising			
Special Fund Raising Events			
Conferences			
Royalties			
Memberships			
Other (specify on separate form)			
TOTAL PROGRAM EXPENSE			
Facilities			
Space Rental			
Purchase Of Building, Real Estate, Etc.			
Mortgage Payment			
Utilities			
Building/Grounds Maintenance			
Other (specify on separate form)			
TOTAL FACILITIES EXPENSE			
GRAND TOTAL CASH EXPENSE			

BUDGET DEFINITIONS

REVENUE

Government Grants/Contracts: Those funds received through application for grants and/or contracts through governmental entities, both federal and state.

United Way: Funding received through allocations, designations, and/or community response funding.

Foundations: Funding received from any foundation, including grants and allocations.

Earned Income/Membership Income: Including membership fees, dues, and money earned from any service being provided.

Unearned Income: Funding received via interest, dividends, etc. (including earnings on endowment funds).

Corporations: Funds received through grants or donations from corporations, including sponsorships.

Fund raising Events/Ticket Sales: Includes proceeds from any fundraisers or special events held by the organization or on behalf of the organization.

In-Kind Support: Includes donated items that are redistributed by the organization.

Individual Contributions: All donations given directly to the organization by an individual or by their family.

Permanently Restricted Asset Income: Income resulting from a perpetual trust where the organization is the beneficiary.

Other: Any other revenue source. **Please complete an attachment to explain what is included here.**

EXPENSES

Personnel - Salaries: Include salaries of all employees. For the project budget, allocate only a percentage of those salaries directly impacted by the project for which funding is being requested.

Payroll Taxes: Include all payroll taxes required.

Health Benefits: Include those health benefits used by employees. Do not include health benefits for an employee who does not take advantage of this benefit.

Pension: Include any employer-contributed pensions.

Contract Workers: Include any temporary or part-time employees who are not considered salaried employees. DO NOT INCLUDE PROFESSIONAL SERVICES RENDERED.

Other: Any other personnel costs not allocated above.

BUDGET DEFINITIONS (CONTINUED)

OPERATIONS

Rent/Mortgage: The annual cost for your building space.

Utilities: The annual cost of utilities, excluding telephone/fax.

Telephone/Fax: Include cost of internet provider fees.

Insurance: Include costs of all insurance including workers compensation, director and officer liability, etc.

Office Supplies: Include cost of all office supplies.

Program Supplies: Include the cost of supplies necessary to run and maintain the program(s) being funded.

Maintenance Supplies: Include the cost of all supplies needed to maintain the operations of the organization.

Postage & Delivery: Include any postage meters, Federal Express/overnight delivery costs, etc.

Professional Service Fees: Include attorneys and accountants.

Training & Development: Include the costs for staff to attend conferences, seminars, and other opportunities directly related to training.

Consultant Fees: Include the costs of any consultants required, i.e. web page design, public relations, etc.

Travel: Include all travel costs necessary to conduct business. Any vehicle expenses should be included in this line item.

Printing and Copying: Any costs to print and copy documents for the organization, including brochures and other materials required.

Repairs and Maintenance: Includes costs to maintain and/or repair building, equipment, and grounds (including service contracts).

Equipment: Include telephones, fax machines, computers, etc.

Depreciation: Include the annual depreciation amount noted in your financial statements. **For the program budget, please include an attachment explaining what is being depreciated, the number of years for which the item is being depreciated, and/or how depreciation is allocated to the program.**

Other: Include any other items not listed above. **Please complete an attachment to explain what is included here.**

ARTS ORGANIZATIONS EVALUATION FORM

A. Quality of artistic product/process/services

1. Mission: What is your mission statement?
2. Artistic Statement: Include a statement by the artistic leadership that shows how the work over the past two years reflects the mission. Identify who wrote the statement.
3. Highlights: Summarize the highlights of your arts activities and accomplishments over the past two completed fiscal years.
4. Evolution: Describe how these programs, activities and services have evolved over the past two years and how these relate to your mission. Include how artistic decisions were made and by whom.
5. Artistic Success: How did you define artistic success and how was it measured over the past two years?

B. Availability of the arts

1. Audience: Describe your audience over the past two years and the larger community from which it was drawn (including key demographics, if available, and other distinguishing features).
2. Outreach: Describe any outreach activities you provided over the past two years.
3. Underserved: Did you address any underserved constituents? Who are they and how did you address them?
4. Education: Describe your organization's arts education or arts in education activities over the past two years.
5. Public: What special efforts did you make to educate, engage and inform the public about the arts over the past two years?
6. Resource: Describe how your organization was a resource for your community over the past two years.

C. Management

1. Organization: Describe your organization's structure, board/staff responsibilities, and level of volunteer involvement over the past two years.
2. Planning: Briefly describe your organization's planning process over the past two years, how and when it occurred, for which areas (such as marketing, audience development, strategic, long-term, etc.) and who conducted and had input into it.
3. Income: Highlight any innovative earned income strategies from the past two years.
4. Budget: Address any issues regarding the budget information provided which you think need clarification (e.g., deficits, surpluses, capital expenses).

PROGRAM EVALUATION REVIEW FORM

Company: _____

Program: _____

Contact Person: _____

Phone: _____ Fax: _____

SUPPLEMENTAL FUND RAISING REPORT
(Current Fiscal Year)

Results of Fund Raising Efforts

Title of Activity	Date of Activity	Purpose for Which Funds are Being Raised	Population Canvassed	Price Per Person (If Applicable)	Net Dollars Raised/Estimated (Direct Expense)

Planned Supplemental Fund Raising
(Proposed)

Title of Activity	Date of Activity	Purpose for Which Funds are Being Raised	Population Canvassed	Price Per Person (If Applicable)	Net Dollars Projected (Direct Expense)