



NINA MASON PULLIAM
CHARITABLE TRUST

2008 Grant Guidelines

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 in the metropolitan areas of Indianapolis and Phoenix.

HISTORY

Nina Mason Pulliam (1906 to 1997) was a business leader, journalist, humanitarian and lover of all creatures.

Mrs. Pulliam helped build Central Newspapers, Inc. (CNI), which was the parent company for Pulliam newspapers in Arizona and Indiana. She was married to Eugene C. Pulliam, CNI founder, from 1941 until his death in 1975. From 1975 to 1979 she served as president of CNI and was publisher of *The Arizona Republic* and *The Phoenix Gazette*.

The Nina Mason Pulliam Charitable Trust was established upon the death of Mrs. Pulliam on March 26, 1997. At her direction, her assets were placed into an irrevocable charitable trust to support the causes she loved in her home states of Arizona and Indiana. The Trust began its grantmaking in 1998 and will be in existence for 50 years.

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 in the metropolitan areas of Indianapolis and Phoenix.

GEOGRAPHIC PRIORITIES

The Trust accepts proposals only from charitable organizations located in and serving the metropolitan areas of Indianapolis and Phoenix, with the exception of environmental requests. The Trust will consider environmental proposals from charitable organizations throughout Arizona and Indiana for projects with statewide impact.

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. From time to time, the Trust may consider circulating requests for proposals on a case-by-case basis.

The Trust will consider emergency funding requests submitted only according to its regular grantmaking schedule.

SCOPE OF FUNDING

Generally, the Nina Mason Pulliam Charitable 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.

PROGRAM AREAS

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, on a limited basis, organizations and programs that bring arts and cultural experiences to 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.

TYPE OF SUPPORT

The Trust awards grants for program projects and capital needs. The latter includes equipment and/or buildings, and to a limited extent, endowments. The Trust also 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. **Organizations within the first three years of operation are required to contact the Trust office to speak with a grants programs staff person prior to submitting a preliminary proposal.**

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 listed below.

Step 1: Preliminary Proposal. Proposals may be submitted in hard copy format or online at 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 such as the IRS 990 form, strategic plan and financial statements. The Trust then will schedule a meeting or site visit that includes representatives of the Trust and the applicant's chief executive and board chair/board member.

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

Submitting a hard copy preliminary proposal

The preliminary proposal must include the following:

- Application Form (5 copies)
- Preliminary Proposal Letter (**not to exceed three pages with print size of at least 12-point**) describing the project (5 copies)
- Board of Directors roster with business affiliation (5 copies)
- IRS 501(c)(3) Determination Letter (1 copy)

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

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 board president.

It 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 within the first three years of operation are required to contact the Trust office to speak with a grants programs staff person prior to submitting a preliminary proposal.** The Trust prefers 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 for the same year.**

The Trust will acknowledge receipt of all complete hard copy preliminary proposals with a postcard within five business days of the deadline.

Submitting an online preliminary proposal

To submit an online preliminary proposal you will need an e-mail address and your organization's IRS tax ID number. You also must be able to attach all required material, with the exception of the IRS determination letter, which may be faxed. This means that you must have the documents stored electronically and accessible to upload during the online proposal process.

The online preliminary proposal must include the following:

- Completed Online Application
- Preliminary Proposal Letter (**not to exceed three pages with print size of at least 12-point**) describing the project
- Board of Directors roster with business affiliation
- IRS 501(c)(3) Determination Letter

For both project and capital requests, attach a list of other support already received and/or pledged (including sources and amounts).

The *Preliminary Proposal 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 online on or before the due date. The Trust appreciates those organizations that submit prior to the deadline. **Organizations within the first three years of operation are required to contact the Trust office to speak with a grants programs staff person prior to submitting a preliminary proposal.** The Trust prefers that former grantees also contact a grants programs staff person prior to submitting a preliminary proposal.

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

FUNDING CYCLE DEADLINES

Preliminary Proposal Deadline	Notification Regarding Preliminary Proposal	Full Proposal Deadline	Funding Notification
January 8, 2008	February 28, 2008	March 17, 2008	June 30, 2008
May 5, 2008	June 30, 2008	July 17, 2008	October 31, 2008
September 5, 2008	October 31, 2008	November 17, 2008	February 27, 2009

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.