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Fundraising

Webinar Two: Successful Proposal Strategies

SAMPLE BASE PROPOSAL—EXAMPLE—not a real organization!

HAMILTON COMMUNITY CENTER

*408 Greenview Street, Chicago, Illinois 60613 Phone: 773-555-9009*

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April 20, 2014

Ms. Karen Phillips  
The A. K. Marks Fund  
231 Harmon Drive  
Chicago, Illinois 60610

Dear Ms. Phillips,

Thank you for your past support of efforts aimed at enhancing the educational opportunities of Hamilton County youth. Today I am writing on behalf of a new collaboration between the Hamilton School District and the Hamilton Community Center. The enclosed funding proposal is for Wisdom Exchange, our joint venture aimed at increasing reading proficiency among Hamilton's struggling elementary school students. We are seeking a \$15,000 grant from the A. K. Marks Fund to launch this innovative program and support the education of the children in our community.

Wisdom Exchange brings together Hamilton's oldest and youngest citizens in one-on-one reading tutorials to strengthen the reading skills and, therefore, the academic performance of our students while enriching the lives of everyone involved. Twice a week, seniors from the Community Center mentor elementary school students whose reading skills have fallen well behind their peers. With professional oversight and individual care, the project has already demonstrated significant success in a pilot program this past year. Many of the students involved improved their reading by a full grade level in just ten weeks.

Now we hope to make Wisdom Exchange a permanent program in the community, tutoring 40 Hamilton students this year over a five-month period. The Community Center has agreed to provide vital classroom space and ongoing supervision for the program, and the school district is an enthusiastic supporter. Our fund raising efforts to date have raised more than \$76,000 from foundations and corporations, and Jasper Publishing recently contributed \$3,500 in reading material that will be used by the tutors and students. Your contribution will ensure that the program can go forward by helping to fund a professional reading instructor, who will train the tutors, and other program costs as outlined in the enclosed proposal.

We have provided a project description and budget along with supplementary materials to help you better understand Wisdom Exchange, our operation, and our goals. We hope the A. K. Marks Fund will be able to provide the essential support that Hamilton's struggling students so desperately need. We would like to arrange a meeting to discuss this innovative reading program whenever is convenient for you. In the meantime, if you have further questions about the program or proposal, please do not hesitate to call me or Margaret Ramos, project director for Wisdom Exchange and director of the HCC Children's Center.

Thank you for considering our proposal. I look forward to speaking with you.

Sincerely,

Samantha Jackson, Executive Director

Wisdom Exchange  
Hamilton Community Center  
April 20, 2014

**WISDOM EXCHANGE**  
**Personalized Reading Enrichment in Hamilton County**

A Request for Funding to  
The A. K. Marks Fund

By  
Samantha Jackson  
Executive Director  
and  
Margaret Ramos  
Director, Hamilton Community Center's Children's Center and Project Director, Wisdom Exchange

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## Executive Summary

The Hamilton School District is facing a literacy crisis that requires immediate and intensive action. Elementary school students' reading levels are well below their peers across the state, and their scores on standardized reading tests are unacceptably low. Teachers in the district report that most of their students finish elementary school unprepared for more advanced studies. The district's high school graduation rate has been falling steadily and last year it dipped below 50 percent for the first time ever. Wisdom Exchange is an innovative project designed to respond to this critical situation.

In a new collaboration, the Hamilton Community Center and the Hamilton School District propose to provide crucial one-on-one instruction for struggling students in the community by enlisting the services of senior citizens as reading tutors. The objectives of Wisdom Exchange in the first year of operation are:

- To increase the reading levels of at least 80 percent of participants by at least one grade level in 20 weeks. Participants include 40 students from the Jackson and Cardwell Elementary Schools, grades three through five, who currently test below their target grade level in reading.
- To provide 40 senior citizens with rewarding, meaningful work, utilizing their skills and experience. The senior citizens will be recruited from the Hamilton Community Center and will be paid for their participation.

Fortunately extensive educational research demonstrates that students who struggle with reading in elementary school can still excel in later grades, provided that they receive the necessary instruction now, when their difficulties can still be corrected. By assisting Hamilton's students at this critical time in their schooling, Wisdom Exchange seeks to improve education across the entire school district and maximize assistance to these students in need.

Established in 1973, the Hamilton Community Center provides a wide variety of educational, recreational and social services to the county's varied population groups. It received the state's prestigious "Excellence in Education" award in eight of the past ten years. Last year, the Community Center successfully conducted a six month reading pilot project on which the Wisdom Exchange Project is based.

The Hamilton Community Center will provide the classroom space and the day-to-day oversight of the project. The Hamilton School District will refer students to the program and help ensure success by monitoring their progress.

Wisdom Exchange seeks a grant of \$15,000 from the A. K. Marks fund to launch the program by hiring a professional reading instructor and covering other essential program costs. With over \$76,000 raised to date, your support will complete the funds needed to undertake this project. In addition, the Community Center and the school district have pledged future support and we are confident that a successful first year of the program will convince other sponsors to join the effort.

The Wisdom Exchange program addresses the needs of both Hamilton's students and its senior citizens, providing meaningful and beneficial assistance to the two groups. Ultimately, the program seeks to bring together the entire community's resources to respond to the literacy crisis in Hamilton County.

## Need Statement

The Hamilton School District is facing a literacy crisis that requires immediate and intensive action. The average elementary school student in the district reads two grade levels below his own. And when the latest standardized reading test was administered last year, Hamilton's students scored well below their peers in the state, placing in the nineteenth percentile. Teachers in the district report that most of their students finish elementary school unprepared for more advanced studies, and last year the district's high school graduation rate dipped below 50 percent for the first time ever.

In order to stem the crisis, Hamilton's struggling students need more intensive reading instruction that the district is unable to provide within its current budget. The latest research on early education has shown that students who fall behind their classmates are rarely able to catch up without individual lessons outside the classroom. A study released last year by researchers at Harvard's Graduate School of Education entitled "The Benefits of One-on-One Reading Instruction" found that an extra three hours per week of personal instruction can quickly elevate a student's reading ability by a full grade level. And a pilot program at the Hamilton Community Center called Wisdom Exchange confirmed those encouraging results with ten Hamilton students last year.

The following report from fourth grade teacher Dennis Barker illustrates the effect of this program:

*Charlene Jones is a fourth grader whose reading test scores in the past two years had shown a striking lack of progress. At the beginning of the school year Charlene was reading at a second grade level. Enrolled in the initial class of the Wisdom Exchange pilot project Charlene met twice a week with a senior citizen tutor Sarah Mulcahy. At the end of the ten weeks Charlene's reading scores improved to almost third grade level. Even more importantly, her classroom teacher reports that her interest level and classroom attention both showed marked improvement as her self confidence grew.*

Educational experts agree that students who struggle with reading in elementary school can excel in later grades, provided they receive the necessary instruction now, when their deficiencies can still be corrected. By assisting Hamilton's students at this critical time in their schooling, Wisdom Exchange seeks to improve their educational potential throughout their school years.

In addition to addressing the needs of Hamilton's struggling students, the program is also designed to provide rewarding work and supplemental income to senior citizens in the community who will tutor the students. A large number of local seniors (65+) find themselves squeezed out of the part-time job market by the growing population of younger adults in Hamilton who are available to fill the existing jobs. In addition, many of these seniors are living on fixed incomes, which often precludes participation in fee-based recreational activities. Wisdom Exchange offers the participating older adults supplemental income and an opportunity for stimulating intergenerational interaction, while providing vital educational support to the students.

The Wisdom Exchange seeks to mobilize the community's resources to respond to the literacy crisis in Hamilton County. The program addresses the needs of Hamilton's students as well as its senior citizens, providing meaningful and beneficial assistance to both groups.

## Project Description

### *Program Goals and Objectives:*

The goals of the Wisdom Exchange program are twofold: for the youth of our area to increase their reading proficiency—and discover the joys of reading and the many doors it can open for them—and to enrich the lives of senior citizens. Wisdom Exchange brings these two goals together in one innovative program that utilizes the knowledge and experience of senior citizens, which they can pass along to a younger generation eager to learn from them. But this won't be just a one-way transaction: the senior citizens who work as tutors will come away from Wisdom Exchange with a renewed sense of mission and accomplishment.

Utilizing the program activities that we will describe below, Wisdom Exchange has the following objectives:

- **To increase the reading levels of at least 80 percent of participants by at least one grade level in 20 weeks.**

Participants include forty students from the Jackson and Cardwell Elementary Schools, grades three through five, who currently test below their target grade level in reading.

- **To provide 40 senior citizens with rewarding, meaningful work, utilizing their skills and experience.**

The senior citizens will be recruited from the Hamilton Community Center and will be paid for their participation.

### *Program Activities:*

The Wisdom Exchange is a collaborative venture between the Hamilton Community Center and the Hamilton School District, each providing needed resources and expertise for the project. The Community Center provides the classroom space and the day-to-day oversight of the project. The school district, along with parents, will help ensure student success by monitoring their progress along the way.

The operating plan for Wisdom Exchange is straightforward: 40 senior citizen tutors from the Hamilton Community Center will tutor 40 students from the Jackson and Cardwell Elementary Schools in reading. Each senior citizen will tutor one student two days a week for 20 weeks.

Fifty percent of the students in the Jackson and Cardwell schools, from which program participants will be recruited, are classified as "high need," that is, they come from families whose incomes are at or below the 50th percentile, including 12 percent who are at or below the federal poverty level. The student population at Jackson and Cardwell is 35 percent Latino/a, 30 percent non-Hispanic white, 21 percent African-American, and 14 percent Asian.

Wisdom Exchange builds on the encouraging results of a pilot program held this past year as part of the Hamilton Community Center's children's center. In that pilot program, ten students were tutored by ten seniors for ten weeks. The students, on average, raised their reading level by one-half of a grade level. All of the participating students showed measurable progress, and some of them improved by a whole grade level in that ten-week period. Given the success of the pilot, we are confident of the potential of an expanded, 20-week program.

Prior to beginning work with the students, our tutors will be recruited by the Community Center's senior coordinator and trained by a professional reading instructor who will then stay on as a consultant to be a

resource for the tutors and students over the course of the program. The training will occur in the month prior to the beginning of tutoring.

During this start-up month, the program will be promoted to parents through the students' teachers and through a direct-mail effort.

Both the training and the tutoring will take place in two classrooms in the children's center at the Community Center, using reading material donated by Jasper Publishing.

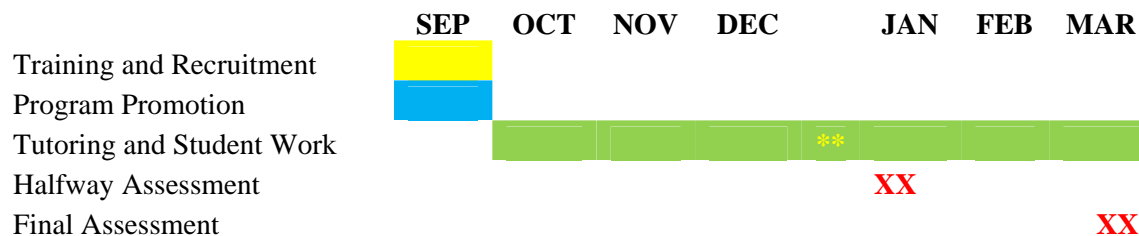
The sessions themselves will be run according to a professionally developed curriculum. The New Millennium Reading Curriculum emphasizes one-on-one interaction that builds on the reading material with conversation and group work; greater attention to each student's needs; a customized pace so that no students are left behind the others; and building personal relationships between tutor and student, giving the student greater impetus to succeed.

The reading instructor, Jessica Hernandez, has successfully applied this curriculum in programs across the region, and the results of our pilot program point toward its continued success here.

During the program, the tutors will be encouraged to get to know the students with whom they are working. While adhering to the curriculum, the tutors will be friendly, encouraging guides through the material, not simply taskmasters. In this way, personal connections will be fostered among all the students and tutors, an approach found in the pilot program to be successful in creating a high level of satisfaction among the participants.

**Wisdom Exchange Timeline**

\*\* = winter vacation



**Staffing and Administration:**

- A **steering committee** will be formed to ensure the collaboration among the children's center, the Jackson and Cardwell Elementary Schools, and the parents of participating students. Each group will have representatives on the committee.
- The director of the children's center, Margaret Ramos, will be the **project director**, with full responsibility for overseeing the project. She will devote 20 percent of her time to the Wisdom Exchange program.
- The tutoring staff will be composed of the 40 **senior citizens**. The ten who tutored in the pilot program have enthusiastically agreed to return and to help recruit other tutors. Each tutor will work a total of three hours a week in two one-and-a-half-hour tutoring sessions.



- The Community Center's **senior coordinator**, Joel Rollins, will oversee recruitment of the senior citizens and will ensure that all tutors are capable of carrying out their responsibilities. He will spend 25 percent of his time working on the project.
- The consultant **reading instructor**, Jessica Hernandez, will train the tutors using the New Millennium Reading Curriculum and prepare them for their interactions with the students. She will also monitor students' progress and administer the reading assessments. She will work a total of 30 days during the school year.

***Evaluation:***

The success of the Wisdom Exchange project will be measured by both quantitative and qualitative assessments:

<p><b>Objective:</b> To increase the reading levels of at least 80 percent of participants by at least one grade level in 20 weeks</p>	<p><b>Reading tests</b></p>	<p>To evaluate whether this objective has been met, a test of reading skills will be given to all students at two intervals: midway and after the program. Test results will be compared to one another to measure the students' improvement.</p>
	<p><b>Work samples</b></p>	<p>We will maintain folders of progressive work samples from students throughout the program. The reading instructor will review these folder to gain additional insight into the progress made by each of the participating students.</p>
<p><b>Objective:</b> To provide 40 senior citizens with rewarding, meaningful work</p>	<p><b>Tutor surveys</b></p>	<p>The Community Center's senior coordinator will survey the senior tutors at the end of the program to ascertain their satisfaction and the degree to which they regard it as a rewarding learning experience.</p>

***Sustainability:***

We have identified five sources to target for continued funding: the Hamilton Community Center, the Hamilton County School District, the United Way, local foundations, and direct support from individuals. We believe that a successful first year combined with the results of the six-month pilot program will demonstrate the positive value that Wisdom Exchange offers to the community, and enhance our efforts

to gain the support of those sources. Two current donors to Community Center programs have already expressed interest in future support for Wisdom Exchange. In addition, the Community Center itself has pledged to fund 50 percent of the ongoing project through its operating budget, and the Hamilton County School District will fund another 25 percent. We will also seek support from the United Way and local foundations.

**Budget**

**Wisdom Exchange - 2014**

***Support***

Foundations, Corporations and Other Support		\$76,521
In-kind contributions: Jasper Publishing-value of reading materials		3,500
Amount Requested from the A.K. Marks Fund		<u>15,000</u>
	<b>Total Support</b>	<b><u>\$95,021</u></b> <b>\$95,021</b>

***Expenses***

***Personnel***

Children's Center Director/Project Director	Annual Salary \$64,000@20% of effort	\$12,800
Senior Coordinator	Annual Salary \$45,000@25% of effort	11,250
Senior Tutors (40)	40 x 3 hours x 20 weeks@\$14/hour	<u>33,600</u>
	<i>Subtotal</i>	\$57,650
Benefits	22% of salaries	<u>\$ 12,683</u>
	<b>Total personnel</b>	<b><u>\$70,333</u></b>

***Nonpersonnel***

Consultant/Reading Specialist	30 days @ \$250/day	\$7,500
Food	After-school snacks for students	1,600
Postage	Promotion and correspondence with parents and teachers	250
Supplies	Reading materials donated by Jasper Publishing	3,500
Transportation	For students and senior tutors	<u>3,200</u>
	<i>Subtotal personnel and nonpersonnel</i>	\$86,383
Overhead (10% allowed by Marks Fund)		<u>\$8,638</u>
	<b>Total expenses</b>	<b><u>\$95,021</u></b>

## **Organizational Information**

The Hamilton Community Center was established in 1973 to enrich the lives of Hamilton's residents, supplement the town government's public services, and provide a civic center for the community's citizens. The Center's mission is to strengthen the lives of diverse communities of people by providing education, support, and other tools to help individuals attain their life goals. We are the only community meeting place in Hamilton, *and by far the town's largest private provider of educational, recreation and social services*. In eight of the past ten years the Center has received the state's prestigious "Excellence in Education" award recognizing its innovative educational programs.

Nearly 500 Hamilton citizens are served by the Community Center each day, and records show that nearly every resident has used the Center's resources at some point. Our primary audience has historically been under-served children and youth, who attend educational and recreational programs and senior citizens, who enjoy daily activities at the center.

The Center's 2014 operating budget is \$1.1 million. Support is provided from the federal and local government agencies, foundations, corporations, and private citizens. In addition, \$18,000 in earned income is generated from the Center's childcare programs and membership fees, and another \$15,000 from investment income on our \$300,000 endowment fund.

The Center has a 14 member board representing the community's constituencies and ethnic diversity. Board members serve a three-year renewable term and are each involved in at least two committees that monitor the work of the Center's programs, administration, and fund raising.

A mix of 14 paid employees and a rotating slate of volunteers staff the Center. The nine professional staff have a combined experience of more than forty-five years working at the Center and are each specifically trained in their area of expertise. In addition, currently more than two dozen volunteers work part-time at the Center each week.

The Hamilton Community Center provides a wide variety of educational, recreational and social services. Our programs include:

### **Childcare Services**

Programs include full day-care, and before and after-school programs for children age two months through fifth grade.

### **After-school Educational Enrichment**

Services include homework help, the "Math and Science are Fun" program, *and the recent successful six month reading pilot project on which the Wisdom Exchange project is based*.

**Recreation**

Recreational activities are provided for children, youth, and senior citizens including after-school and weekend athletics, exercise programs, cultural activities, and other field trips.

**The Center for Youth**

After-school, weekend, and summer programs are provide focusing on educational, recreational, and job counseling and placement services.

**Senior Center**

The center provides educational, health and recreational activities for our community's diverse senior population. Services also include a foster grandparent and home care program.

**Conclusion**

Wisdom Exchange will build on the successful track record of last year's pilot project to significantly improve the reading scores of elementary school students in the Jackson and Cardwell elementary schools, where average reading levels are some of the lowest in the state.

The board and staff of the Hamilton Community Center and the Hamilton School District are committed to improving the reading levels of our students. We know how critical it is to students' future success to get them on or above reading grade level during the elementary school years.

We have already raised \$80,021 toward our project goal of \$95,021. Your gift of \$15,000 will complete our funding needs for the upcoming year and allow us to retain the services of the reading instructor who is critical to moving this project forward in a timely fashion.

**Appendix 1**

## Appendix 2

### **The Hamilton Community Center: 2013 Board of Directors**

Chairman:	Mark S. Gallagher	Central Valley Hospital
Vice Chairman:	Shirley Hernandez	Blanding Corporation
Vice Chairman:	Jack V. Combs	Hamilton School District
Treasurer:	Caroline Goodwin	Childcare Action Committee
Secretary:	Margot Cavanaugh	Capital Savings Bank
Members:	Kristen Bailey	Chicago Cares
	George C. Dean	Hamilton Arts Council
	Susan O. Hall	Morgan Real Estate Partners
	Ralph Jenkins	Conco, Inc.
	Peter E. Meyers	Hamilton Economic Development Corp.
	Susan R. Petrie	Community Volunteer
	Francine Rutland	Consultant
	Carl E. Vance	Jasper Publishing
	Marilyn C. Victor	Educational Alternatives, Inc.
	Samantha Jackson	Hamilton Community Center
	<i>Ex officio</i>	

### **The Hamilton School District 2013 Board of Education and Executive Staff**

#### Board of Education

Chairman:	Jose B. Munoz	Century Welding Corp.
Vice Chairman:	Dennis Campbell	Carson, Campbell and Schmidt

Members:	Martha Derby	Derby Cultural Center
	John Congrove	Harding Health Corp.
	Manuel Brito	Consultant
	Sarah K. Williams	Clinical Psychologist
	Katherine James	Central Valley Hospital
	Steven B. Nitsch	Safco Building Supplies

#### Executive Staff:

Superintendent of Schools	William E. Conroy	Hamilton School District
Principal	Joy V. Morgan	Jackson Elementary School
Principal	Bernard Dash	Cardwell Elementary School

## Appendix 3

### Wisdom Exchange Staffing

#### Margaret Z. Ramos, Project Director

Margaret is currently the director of the Hamilton Community Center's Children's Center, serving in this position for the past seven years. She holds a Master's in Educational Administration from Northwestern University and is a certified elementary school teacher having taught in the Hamilton schools for 9 years before coming to the Community Center. During her years of teaching, Margaret successfully taught reading to students of all ability levels. She was responsible for initiating the Wisdom Exchange pilot project at the Community Center and for overseeing its successful completion.

#### Jessica Hernandez, Reading Instructor

Jessica is a reading specialist and former elementary school teacher with 15 years of teaching experience. She joined Teach for America after graduating from Columbia University and she received her Master's in Education and was certified as an elementary school teacher in 1993. Jessica taught in two nearby school districts for more than ten years and became a state certified reading specialist seven years ago. Last year, she was recruited as a consultant for the Wisdom Exchange's successful 6-month pilot project.

#### Joel Rollins, Senior Coordinator

As a member of the Community Center's senior programming staff, Joel is responsible for all senior citizen activities. Joel has worked with seniors for the past 11 years and joined the Center's staff four years ago. He graduated from Lehigh University and has a Master's in Social Work from Rutgers. During Wisdom Exchange's pilot project, Joel successfully recruited the senior tutors from among senior center attendees and the larger community. In addition to the participants in the pilot project, Joel has a waiting list of seniors eager to join the expanded Wisdom Exchange program.