

Grant Proposal
For



Developed by
Rebecca Hayes

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Grants Administrator
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To the Grant Administrator,

“Have you ever witnessed a child die of hunger? Can you imagine teaching a simple procedure to a doctor or nurse that will allow them to save the life of a newborn? Do you know what it is like to have to say, ‘There is no more.’ when someone asks for medicine? The incredible joys and sorrows of human existence are part of what Heart to Heart tries to process every day,” states Dr. Gary Morsch, Heart to Heart International’s founder.

Heart to Heart is a non-profit organization that answers the call of need in countries around the world. Through carefully cultivated partnerships, Heart to Heart provides millions of dollars worth of medical supplies, crisis relief, and teaches important medical procedures to doctors of developing countries as well as providing relief to thousands in the U.S.

Heart to Heart, because of its overwhelming number of contacts in the form of partnerships and donors, has started a computer program called Raiser’s Edge that helps them process mailings, keep track of donors, and materials. However, they have not had the funding to train their staff in the program, and are instead spending money every month to pay a consulting firm to do the work their staff could, if they were trained properly. A grant of \$6,000 would provide the budget needed for their staff to complete the two-month training sessions. By training their staff more money will be able to go to the aid of those in need.

Because you are a company that is concerned with supporting the needs of non-profit organizations in the Kansas City area, we know you will be interested in helping Heart to Heart help others.

I have enjoyed working with Heart to Heart, and if you have any questions, let me know.

Sincerely,

Rebecca Hayes

Abstract

Heart to Heart international is an organization dedicated to helping those in need. They have three kinds of programs, international programs, domestic programs and disaster relief programs. Heart to Heart forms partnerships with other humanitarian organizations, in an effort to provide for a larger number of people. Since its beginning in 1992, with a single humanitarian airlift of medicines to Russia, Heart to heart has grown to sponsor or aid projects in nearly 100 countries around the world. They also now provide hundreds of social service agencies, including homeless and domestic violence shelters, inner-city clinics and elderly-care facilities in cities across the U.S., with shipments of medicines, medical supplies, hygiene products and gift items, free-of-charge, as well as volunteer support. Heart to Heart also serves those in crisis, often providing support long after the initial aid has run out. Heart to Heart is a large and complex organization aiding millions; however, Heart to Heart now needs your help. They have purchased a computer program called "Raiser's Edge," that will help them track donors and supplies, create mailings, and aid in volunteer management; yet, they have not been properly trained on how to use it. They have found a consulting company to train them, but are lacking funds to continue.

This proposal will address the Raiser's Edge program features and abilities, as well as provide more information about the complexities of Heart to Heart. An explanation will also be given of the consulting company's training goals. Finally, the benefits the program will have on Heart to Heart financially and organizationally will be discussed.

Introduction

An unborn child in Sichuan, China; a young girl who lost her father in the 9/11 attacks; a Chinese grandfather losing his eyesight to cataracts; a family in Kansas left homeless by a tornado; a mother needing medicine in Uzbekistan, a child in Iraq who just wants to go to school, there are people in need everywhere, but how can you and I personally reach out and help them? This is where Heart to Heart comes in.



What is Heart to Heart International?

Mission Statement

Heart to Heart International is a global humanitarian organization that inspires, empowers and mobilizes individuals to serve the needs of the poor in their communities and around the world.

Heart to Heart accomplishes this mission through partnerships that promote health; alleviate hunger; offer resources, education and hope; and provide opportunities for meaningful service (hearttoheart.org).



+ Others = More Served

History

As a medical volunteer, Dr. Gary Morsch visited the city of Calcutta, India. “I will never forget what I saw,” he said. “People by the thousands, homeless people, sleeping in the ditches, on the sidewalks and in the gutters, literally tens of thousands of people! One woman looked at me and said: ‘Will you come back?’ And I said ‘Yes;’ I meant it not so much literally, but figuratively: ‘I’m not going to forget you. I will do something.’”

Back home, Morsch was determined to keep his promise. He started small, by persuading his Rotary Club in 1989 to rebuild a YWCA in Belize. Later, after several other smaller projects, he and others from the Olathe (Kansas) Rotary Club collected a few medical supplies and hand carried them in 1991 to Russian doctors near Minsk. It wasn’t much—about ten duffel bags of product—but the doctors cried when they received the supplies.

When they returned home, Dr. Morsch dared to dream: “What if we could deliver an entire plane load of medicine to Moscow?”

This was the beginning of a furious grass-roots campaign that drew national attention—eventually that of the U.S. State Department. Dr. Morsch and the newly named volunteer group Heart to Heart managed to get the government to donate a C-5 military cargo plane to deliver \$5 million worth of donated pharmaceuticals, medical supplies and food. It became the largest volunteer-driven airlift ever recorded by the U.S. State Department and in May 1992, the plane landed in Moscow with 75 tons of relief supplies (hearttoheart.org).



International Programs

Heart to Heart is perhaps most widely known for its large airlifts of medicines to developing nations. Heart to Heart has also had a significant impact on developing health systems. In the emerging democracies of the NIS, or Newly Independent States (countries formerly a part of the Soviet Union), Heart to Heart has led seminars and symposia in continuing medical education, family practice and most recently, courses in Advanced Life Support in Obstetrics. In the People’s Republic of China, Heart to Heart has offered medical professionals’ training in neonatal resuscitation, ophthalmology and now emergency medicine.

Heart to Heart’s International Programs are both relief and development focused. The large international airlifts are often accompanied by a delegation of volunteers (medical and non-medical) who do much more than assist in the delivery of medicines and education—they also build bridges of friendship and understanding between countries that are worlds apart.

3 yr. International Project History

2003	Heart to Heart's Annual CARElift in Kansas City, Oklahoma City and San Diego <i>March/April 2003</i> Product Value: \$500,000
	Disaster Relief Project for Tornado Victims in Kansas City and Oklahoma City <i>May/June 2003</i> Project(s): Product distribution (KC), product collection (KC), and volunteer teams (KC and OKC)
	International education and development projects in China <i>Ongoing in 2003</i>
2002	Heart to Heart's Annual CARElift in 8 U.S. cities <i>March 2002</i> Product value: \$500,000
	International airlifts to Uzbekistan <i>April, August and October 2002</i> Product value: \$40 million
	Disaster Relief Project to Israel, West Bank and Gaza <i>April 2002 to January 2003</i> Product value: More than \$700,000
	International education and development projects in China <i>May 2001</i> Product Value: Over \$30 Million in a 10yr. History
2001	International airlift to Vietnam <i>February 2001</i> Product value: \$4.25 million
	Heart to Heart's Annual CARElift in 7 U.S. cities <i>March 2001</i> Product value: \$500,000
	International education and development projects in China <i>May 2001</i>
	International airlift to the Republic of Georgia <i>August 2001</i> Product value: \$2.9 million
	Disaster Relief Project for victims of 9/11/01 terrorist attacks <i>September 2001</i> Product value: \$1.5 million
	International airlift to Moldova <i>October 2001 and February 2002</i> Product value: Nearly \$15 million
	International airlift to Uzbekistan <i>December 2001</i> Product value: \$2.3 million

Plus Many Many more! (hearttoheart.org).

Domestic Programs

While the country in which we live is known around the world as the land of opportunity, millions of Americans live in poverty and on the streets, struggling to survive. Victims of domestic violence, abuse, addiction and personal tragedy, these hurting people are lost and looking for help.

Social service agencies working on America's frontlines provide hope and help for these suffering individuals. These agencies literally touch millions of lives each year, and yet they themselves often struggle to survive due to a lack of financial resources and volunteer support. Because they are often the last hope for people in need, their presence in communities across America is vitally important.

Heart to Heart supports the work of America's top social service agencies by providing them with product and volunteer support—allowing them to spend their precious resources (time and money) on directly impacting the lives of Americans everyday. By working together with them, literally millions of people lives are changed every year.

Heart to Heart has three main components to their Domestic Programs: agencies, products and volunteers. They form partnerships with agencies such as homeless shelters, domestic violence shelters, daycare centers, elderly-care facilities, rural and inner-city health clinics. Regular shipments of product are provided to registered agencies throughout the year. Agencies receive only items that they have requested in quantities that they approve.

A network of several hundred pharmaceutical companies and manufacturers provide products. These products include:

- pharmaceuticals
- over-the-counter medicines
- baby care products
- personal hygiene items
- nutritional supplement
- school supplies
- paper products
- toys
- gift items



Heart to Heart also actively recruits volunteers from corporations, schools, churches and civic groups to assist in the collection, sorting and delivery of product to recipient agencies. Volunteers also donate time to assist some of the agencies with special projects such as painting, cleaning, providing clerical and administrative assistance, organizing parties and helping with other general tasks.

Disaster Relief

Heart to Heart provides aid for people in crisis, in the U.S. and around the world. They are committed to providing the right aid, to the right people, at the right time, and often serve as a “second wave” of relief to areas in great need, and sometimes remain at work in the crisis area, helping cities and countries rebuild long after initial waves of support have run out.

3 yr. Disaster Relief Projects history	
2003	May 2003 Midwest Tornadoes
	Iraqi Refugees
2001/2002	Israel, West Bank and Gaza
	Stabilization of Central Asia
	Attack on America 9/11/01
	Arizona and Colorado Forest Fires
	Goma, Africa

Heart to Heart Today

Currently, Heart to Heart is working on a number of large projects as well as continuing to create partnerships with other humanitarian organizations. These partnerships have been instrumental in providing for millions of people in need. For example, in 2003 Heart to Heart teamed up with the Kansas District Rotary Clubs to gather two million dollars worth of medical supplies for two hospitals in Panama. Seaton United Van Lines also joined them to provide warehouse space.

Because of the huge number of partnerships that cover the world, in the form of both donors and recipients of aid, Heart to Heart has an incredible amount of contact information to track, so they need a computer system that has the ability to help them accomplish this. Raiser’s Edge can provide this type of computer support, but without proper training of the staff that will use this program, Heart to Heart will not be able to work in an efficient manner and will continue to spend extra money hiring a consulting firm to come in once a month to actually do the project that Heart to Heart’s own staff would be able to do given adequate training. In behalf of Heart to Heart International, we are asking for a grant of \$6,000 to provide them with training on the Raiser’s Edge Software.

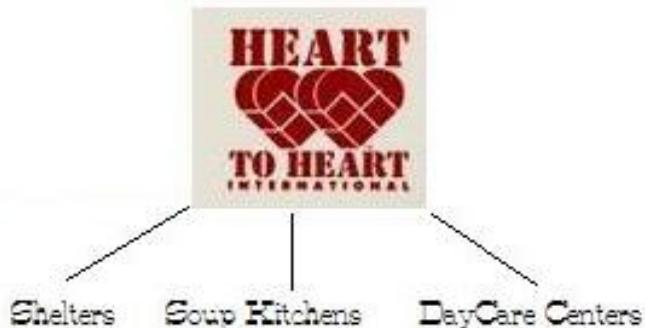
Statement of Situation to Be Evaluated

Specific Problem to be Addressed

Heart to Heart International is a large and far-reaching humanitarian organization. Over the last twelve years they have grown to include partnerships with smaller humanitarian organizations, which without the support provided by Heart to Heart in the form of donating items as well as providing volunteers, many would not be able to provide for the overwhelming number of people in need. Because Heart to Heart sends aid and receives aid from all over the world, they need a computer program that will allow them to track and process their transactions. They have found a program that can provide this; however, they do not have the funding to train their staff properly in its use. Unless they receive a grant to cover the costs of training, they will continue to spend money each month on a hired consulting firm to do jobs they would be able to do themselves—money that would otherwise be spent to aid people in need.

Rationale for the Proposed Project

Heart to Heart is a major link in the global community. Not only do they provide physically for people's needs, they have created friendships and links throughout the world, and that is Heart to Heart's main goal. Gary Morsch, Heart to Heart's founder states, "Not only do we restore health and improve the quality of life for millions, but just as important, we offer hope, and it makes all the difference in the world. Millions more are counting on us." It is an organization that not only offers aid but also gives hundreds of people living in prosperity the chance to give of their time and abilities to lift the hopes of others. It is truly a service that goes from heart to heart.



Proposed Solution

Donor Management Software



Heart to Heart has been working hard to stay up to date with their many donors and partnerships. In order to achieve efficiency, they have implemented a computer program called Raiser's Edge. This program is a donor management software product designed and supported by Blackbaud, Inc. In comparison to other software products, Raiser's Edge far exceeds the capabilities and use to other donor management software products. In today's economy it is imperative that organizations effectively track their constituents because there is more competition for the same charitable dollar

from donors; especially with the growing number of non-profit organizations. Raiser's Edge allows organizations to not only track charitable revenues as well as from whom the dollar came, but it also has the following capabilities:

- Track Appeal (solicitation) performance, this helps analyze the cost & income per donor as well as comparing to past appeals or other appeal types. Typically most every non-profit has some sort of "direct mail" fundraising activity, and with the cost of these appeals increasing (postage, design, printing) it is very important to make the appeal as effective as possible.
- Event Management - the software can also track different fundraising events (auctions, dinners, etc.) - manage vendors, seating assignments, accommodations for presenters, and most important the participants.
- Volunteer Management - some non-profits are extremely volunteer driven, this component to RE allows organizations to gauge what percent of the development efforts are related to volunteers. Tracking time sheets, assigning a value per job, and assigning volunteers to upcoming jobs are just a few points that this component can do.
- Tracking Gift In Kind (GIK) contributions and valuing these donations.
- Membership Tracking and memorial gift tracking are just a few other components that are possible with the software.

Aside from the different modules mentioned above, Raiser's Edge specializes in allowing organizations to "customize" constituent management to personalize acknowledgment, solicitation, and recognition of that donor. This is not a list of all of the possibilities, but below are the important one's to consider:

- When a spouse dies, it's important to not only track the death of the spouse but also make sure that surviving spouse is addressed properly (i.e., no longer mail to "Mr. and Mrs. Smith" when "Mr. Smith" has died).
- When you have Board Members or Committee Members tracked, you don't want correspondence going to both spouses (if married). Coding the records as members in addition to customizing the addressee/salutations specific for these mailings is very important.
- Many donors have family foundations, trusts, or estates that can be difficult to manage because you solicit the person (not the foundation/trust/estate), but the gifts come from these entities not the person. Having these gifts noted on the individual records as well as on the organizational record noted (without duplication) is an important thing to do so that the correct constituent is acknowledged and solicited in the future.

Management functions are primarily what have been noted so far (how things are put in the database (db)). This again, is only one function of Raiser's Edge. The following are just a few output functions of the db.

- *Donor Acknowledgement Letters* - The software has the capability to know when records have not been acknowledged, and create the correct letter. The user must set all of this up.
- *Various Mailing Functions* - Traditionally you had to "export" out of whatever database you were using and then merge the information into Word or some other processor function. RE has many merge functions automatically built in that make this process easier - but training is the component. Creating labels, envelops, quick letters, follow up letters, phone-a-thon forms all can be created easily in RE.
- *Reports* - there are approximately 130 different built-in reporting functions that will allow the user to look at (and analyze) different things in the database. The reports are broken down by category (analytical, financial, pledge, etc.) and then within each category are more specific report templates that will do various things for the user. All of these are important functions, and can be used for many different things, but basic knowledge and training have to be present in order for the user to properly set these up (Haynes).

Staff Training

Heart to Heart, for the last few months, has been paying Harvel Consulting, L.L.C to come in and set up these output projects. However, this consulting firm is willing to provide Heart to Heart's staff with training on Raiser's Edge. Matthew Haynes, Harvel Consulting's representative for Heart to Heart says that proper training would extend over a two-month period. The staff would be trained 3-4 hours each week. However, based on the complexity of the organization, more training may be needed. Training is also customized to the organizations needs that allows them to gain the most benefits from the program. Initially, there will be a two-day training session, tentatively following a schedule much like this:



DAY 1:

1. Raiser's Edge: Support – importance and ease.
2. Constituent Management – navigation of the *Home Page, Records, Query, Export, Reports, Mail, Dashboard*.
3. Overview of Records – searching for records, the anatomy of Individual and Organizational record types.
4. Creation of new Individual records.
5. Overview of constituency codes and addressee/salutation types.
6. Actions.
7. Managing relationships.
8. Query – types of queries, searching for queries, setting up queries, and merging queries.

DAY 2:

1. Review of Day 1. Question and answer.
2. Exports and Raiser's Edge: Mail – overview and setting up. Producing letters, labels, and envelopes.
3. Reports – Overview of reports, gift detail and summary reports, action reports, and volunteer reports.

This training will have an immense impact on Heart to Heart's ability to provide for as many as possible. Simply removing the cost of paying the consulting firm \$500 each month to set up their projects will free up money in the long run that can be spent on humanitarian aid. In one year alone, the money spent on paying Harvel Consulting to come in each month will amount to \$6,000. The money spent on the training will repay itself in a year, saving thousands each year for humanitarian efforts. This program also has effects that are immeasurable in that it provides a way to track donors and will help Heart to Heart reach more people (Haynes 2/22/04).



Conclusion



Heart to Heart International is an organization that provides for the needs of literally millions of people around the world. People like the unborn child in Sichuan, whose life was saved because Heart to Heart has started a program teaching the nurses the proper way to resuscitate a distressed newborn. People like the young girl who lost her father in the 9/11 attacks whose mother was given financial aid by Heart to Heart when she could not find a job. People like the Chinese grandfather losing his eyesight to cataracts who received treatment

from Heart to Heart's Mobile Eye Treatment Center. People like the family in Kansas left homeless by a tornado that received immediate aid in the form of care kits from Heart to Heart. People like the mother needing medicine in Uzbekistan who received aid just in time, from one of Heart to Heart's international airlifts. People like the child in Iraq who just wants to go to school who saw his wish come true when Heart to Heart joined forces with American troops in Iraq to help rebuild the schools and provide school supplies. Heart to Heart needs your help to continue helping others, so the links of service can continue from heart to heart.



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