

# HARRY C. TREXLER TRUST

Procedure

Deadline: December 1st



Harry C. Trexler was an entrepreneur, agriculturalist and philanthropist who spent his lifetime accumulating businesses and wealth. Generous in life, his philanthropy continues through the private foundation established with the estates of Harry and Mary (Mosser) Trexler.

During the more than 85 years of its operation, the Harry C. Trexler Trust has aided the work of many Lehigh County charities and the City of Allentown's parks. General and Mrs. Trexler's generosity toward the citizens of Allentown and Lehigh County is perpetuated by the Trexler Trust.

## The Trexler Trust

Established by and under the direction of the Will of General Harry C. Trexler, his Trustees must make distributions "for such charitable organizations and objects as in their discretion shall be of the most benefit to humanity ... limiting them ... to the City of Allentown and the County of Lehigh ..."

In evaluating whether, in their collective judgment, grant seekers are "worthy organizations which have for their object, and which truly serve for the benefit of mankind," the Trustees carefully examine the merits of each organization as well as its individual grant request.

The assessment of an organization's charitable character begins with an examination of its Articles of Incorporation and By Laws. Beyond this initial familiarization with the organization's stated purpose, the Trustees will consider such facts and circumstances as will contribute to a clear understanding of the way in which the organization actually operates.

General Trexler's criterion, that of being "of the most benefit to humanity" is clearly subjective in nature. Applicants must succeed in communicating the value and success of their program or project to the Trustees using the 3-page grant request.

General Trexler invested in his Trustees the discretion to choose annually which organizations in their judgment will be of the most benefit to humanity in the City of Allentown and Lehigh County.

## Organizational Eligibility

Based on the interpretation of General Trexler's Will by Lehigh County Courts, charitable organizations eligible for funding must be domiciled in Lehigh County, Pennsylvania. Domicile is documented by the legal address of the organization and principal place of business stated on its Articles of Incorporation as filed with the Commonwealth of Pennsylvania. Charitable organizations not domiciled in Lehigh County, Pennsylvania are ineligible. Your time and resources are valuable; if you are unsure of your eligibility please call the office at (610) 434-9645 before you submit a request.

Please affirm that you share our commitment to creating a welcoming and affirming environment for all as they are, respecting without hesitation all of the elements of their identity including religion, age, race, ethnicity, gender identity, and sexual orientation. Please also affirm that your organization seeks to promote diversity and inclusion in its governance policies as well as in its efforts for your staff to be representative of the diverse nature of the communities which you serve. If you are unable to affirm these core tenets, please refrain from applying for funding.

Current as of August 2020



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## Timing of Request

Requests must be received before 4:30pm on December 1st. Those requests received after the deadline will not be considered. NO application is considered complete without all documents and requested information provided by December 1. Successful completion of the form does not guarantee a grant.

Prospective grantees are welcome to request a meeting with staff well in advance of the December 1st deadline to discuss the grant application process.

The 3-page grant request, a narrative in the form of a letter, must be accompanied by the completed Summary Form and supporting documents and be addressed to:

Trustees

Harry C. Trexler Trust  
33 South Seventh Street, Suite 205  
Allentown, Pennsylvania 18101

Please call the office at (610) 434-9645 with questions or to secure a link for electronic filing. Check our website for frequently asked questions at [www.TrexlerTrust.org](http://www.TrexlerTrust.org).

## 3-Page Grant Request:

The 3-page grant request is the most important part of your grant request; it is your organization's request to the Trust. The narrative should be used to persuade the Trustees of the worth of your program, project, and institution.

Within the three-pages, explain the problem, identify the solution, lay out the tools needed to affect the solution, set the standard of achievement, and convince the Trustees that your organization is fully capable of delivering success.

All requests must carefully state the project or program's goal and objectives and how those will be measured. It is not enough to state how many clients will be impacted by services. Grantees must articulate, using quantitative measures, how clients' lives will be impacted by services.

The Goal of a program is the overall achievement desired. The Objectives are measurable outcomes resulting from a program or service. Objectives must be quantifiable, specifically tied to the methods to be used, matched with appropriate benchmarks, and measured over a particular time-period. Clients will gain in knowledge, skills, and attitudes that lead to behavioral changes resulting from participation in the project or program.

Clearly identify the tools or data collection methods to be used to measure change. (Surveys, tests, interviews, observations, etc.) Articulate targets in numbers or percentages that will define success.

An example: Over a defined time-period, 30 students will participate in the program resulting in increased reading ability. Success is defined as reaching a goal of 70% of the youth having improved their reading ability by one grade level.



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The actual grant request should take the form of a letter, no longer than three pages, stating the need, how the need will be met, how the organization is best positioned to meet the need, the resources (including funds) required, the time-frame, and the methods and measurement standards to determine success.

Clearly articulate the project or program's timeline. If finite, provide an estimated completion date. If the project or program is expected to continue beyond three years, describe the plan to financially sustain it and how progress will be evaluated throughout that period.

Include in the narrative the total amount of funding required, the amount sought from the Trexler Trust, and the sources from which the difference (if any) will be derived.

Pages over the three-page limit will be discarded. The narrative should appear on agency letterhead. Please do not include photos or colored graphs. Links to internet sources are not advised.

### **To make a request, an agency must:**

Include all required official documents and fully complete page four of this form and provide the following:

- 3-Page Grant Request (Submit a letter no longer than three-pages.)
- Funding Sources (List funding amounts raised from Lehigh County sources and those raised from sources outside of Lehigh County.)
- Financial Statements (Balance Sheet and Income Statement) for the most recent, completed fiscal year (preferably audited).
- Agency Operating Budget - Current fiscal year's operating budget for the agency.
- Program or Project Budget (that is the subject of the request).
- Form 990 - Federal Tax Return for the most recent, completed fiscal year. If an extension has been sought for filing of Form 990, include a copy of the extension request form.
- Board Member Information – Present list of Board of Directors (include their names, mailing addresses and the beginning and end dates of their individual terms).
- Client Statistics
  - Total Number of clients served by the organization
  - Number of clients residing in Lehigh County
  - Total number of clients served by the proposed project or program and number of Lehigh County residents who are served by the proposed project or program.
- Articles of Incorporation or Recent Amendment
- By Laws
- IRS Determination Letter



# HARRY C. TREXLER TRUST

Summary Form

Deadline: December 1st



*All fields, including the required officer signatures, must be completed. Incomplete submissions will not be accepted.*

Date: \_\_\_\_\_ Amount Requested: \$ \_\_\_\_\_

Legal Name of Organization: \_\_\_\_\_

Principal Business Address (per Articles of Incorporation - Must be in Lehigh County): \_\_\_\_\_

Name, Title, Preferred Mailing Address, Phone Number and email of person able to address questions regarding this request.

Summarize the proposal:

## Applications must include:

Your organization is responsible for determining well in advance of the December 1st deadline whether the following documents are current and on file with the Trexler Trust. If any changes have been made, please submit a copy of the changed document noting its date and indicating that a new copy is attached. Otherwise, please complete the affirmation of governing document status. An Officer, as defined by the organization's By Laws, must complete the affirmation.

Articles of Corporation or Recent Amendment  Attached Date of Document \_\_\_\_\_

Current By Laws  Attached Date of Document \_\_\_\_\_

IRS Determination Letter  Attached Date of Document \_\_\_\_\_

## Affirmation of Governing Document Status

I, as an officer of \_\_\_\_\_, hereby certify that no changes have been made to the Corporate Articles, By Laws, and/or IRS Determination since the previous grant request made on \_\_\_\_\_.

Date

\_\_\_\_\_  
Officer of the Corporation

\_\_\_\_\_  
Date

Total value of the annual compensation and benefits for the:

Executive Director \$ \_\_\_\_\_ Amount \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Fiscal Year

Development Director \$ \_\_\_\_\_ Amount \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Fiscal Year

\_\_\_\_\_ % of Board Members contributing funding

*Your organization must complete this form in its entirety to be considered for a grant. Successful completion of the form does not guarantee a grant.*

