



## **OUTLINE OF GRANT REQUEST REQUIREMENTS**

This Foundation asks that requests for grants or other funds be submitted to it in writing. There are no specific application forms, but the Board of Directors wishes the following information to accompany each grant request:

### **REQUIRED:**

1. Name, address, contact officer, and telephone number of the tax-exempt organization which will be the recipient of the grant or funds.
2. The amount requested, and a complete statement why the grant is needed and what will be done with the money.
  - (a) What the grant is expected to accomplish.
3. Position or relationship to the applicant organization of the individual signing the grant request, and that the grant request has been authorized by the governing board to be submitted on behalf of the requesting organization.
4. A detailed budget of the project or need, showing how the requested funds from this Foundation would be spent. (Three columns usually are effective: Line Item, Total Project, and Foundation Funds.)
5. An explanation of why the organization cannot assume the budget or costs of the project with its own resources and fund-raising.
6. The application must furnish as attachments:
  - (a) A copy of its most recent letter of exemption from the Internal Revenue Service demonstrating that it is an organization exempt from Federal Income Tax under Section 501(c)(3) of the Internal Revenue Code.

(b) A copy of the form or letter from the Internal Revenue Service classifying the applicant as “not a private foundation” under Section 509(a) of the Internal Revenue Code. If this is not available, an explanation should be submitted as to the status of the applicant. Recent exemption letters include (a) and (b) in one letter.

(c) A statement signed by you that your organization’s tax exemption under IRC Section 501(c)(3) and your status under Section 509(a) has not been revoked or modified.

(d) If the applicant is a unit of government, evidence of this relationship shall be submitted, and the legal title of the organization provided.

SUGGESTED:

1. Whether aid is being sought on this project or will be requested from other foundations or any other sources; whether such solicitation is contemplated; and, if so, the names of these sources and the amounts requested from each over \$1,000. (This is for informational purposes only and should not be interpreted to mean that we discourage aid from other sources; in fact, we strongly encourage participation of other donors.)
2. Tests by which the effectiveness of the grant, if made, should be judged when the grant funds have been expended, or results known.
3. The length of time for which the Foundation aid will be needed, including a timetable showing starting date and completion dates for the project or for use of the grant funds. Please do not omit this information, and advise us of changes, if any.

A grant request should be submitted in two copies (original with one copy), except that if the accompanying printed material is in limited supply, it may be provided in one copy.

Grant requests, when received, will be distributed to the Advisory Committee and then the Board of Directors of The Equity Group Foundation, Inc. for processing and will not be returned to the applicants.

When a grant request has been acted on by the Board of Directors, such action is final upon the request as presented. It normally will not be carried over for future consideration at later Board or Advisory Committee meetings unless specifically designated for further investigation or deferred by the Board of Directors. The applicant is not, however, precluded by denial of a request from making other new grant requests in the future unless the field of a denied request is one which our Board of Directors has limited by a policy determination.

Grant applicants should know that action by the Board of Directors of the Foundation ordinarily may not come in less than two months from the time the original complete grant request is filed. In many instances, the time for consideration, staff or consultant investigation, decision by the Advisory Committee and by the Board of Directors of the Foundation may be considerably longer than two months because of the nature of the grant request, lack of available funds, the amount sought, or the time elapsing until the next scheduled Board of Director's meeting (or Advisory Committee meeting). Since grant requests are taken up in order filed, an early filing of your request as against any deadline, is strongly encouraged.

**Grant requests should be addressed to:**

The Equity Group Foundation, Inc.  
8405 SW Nimbus Avenue, Suite C  
Beaverton, Oregon 97008

Mailing Address: P.O. Box 25308, Portland, OR 97298

Telephone: (503) 670-3000