



PURPOSE

The PYM Quaker Buildings and Programs Granting Group (QB&P) makes grants for construction, renovation, and capital improvement projects of Quaker organizations, and to support programs that strengthen Quaker retirement communities, programs for family planning, and specific Friends organizations, in accordance with the donor restrictions as outlined below.

TYPES OF GRANTS

Building Grants are available to Retirement Facilities, Schools and other Quaker organizations in the PYM region; and to Quaker Meetings within the USA.

Program Grants are available to Friends retirement facilities in the PYM area, to Friends Journal, to AFSC for social service projects in the USA; to organizations such as the Friends Council on Education or the Committee on Friends Education to support the education of PYM Young Friends in Friends Schools; and to organizations within the PYM area that offer programs offering or relating to planned parenthood, birth control, and family planning, including advocacy, education, or direct services.

Project scope varies by type of organization, as described under “Eligibility”. The trusts establishing these funds restrict their usage; requests for grants that fall outside of the trust restrictions cannot be considered.

ELIGIBILITY

The following types of organizations are eligible to apply:

1. **Friends Meetings** within the United States may apply for construction of new meeting houses or renovation of meeting houses in active use.
2. **Friends Retirement Facilities** within the PYM area may request program grants for initiatives that support and strengthen them as Quaker retirement communities, and building grants for construction, renovation, capital or equipment projects, and maintenance.
3. **Quaker Organizations** in the PYM region may apply for grants for building acquisition, construction and renovation (not maintenance).
4. **Non-Profit Organizations** in the PYM region may apply for grants for projects relating to family planning and birth control.

In addition to the above types of organizations, several organizations and purposes were specifically cited for eligibility by the donors of the funds from which we make grants, as follows: **AFSC** may apply for program grants in support of social service projects in the USA; **Friends Publishing Corporation** may apply for program grants; **organizations that support the education of PYM Young Friends in Friends Schools**, such as, but not only, the Friends Council on Education or the Committee on Friends Education, may apply for program grants in support of those purposes.

APPLICATION REQUIREMENTS

1. Applicants with overdue reports on prior QB&P grants are ineligible to make new grant requests.
2. Organizations may apply for up to two projects per year, either for two projects at one deadline or one project at each deadline.
3. To qualify as a Quaker organization, at least 50% of board members must be members of Quaker Meetings.
4. Applications should not be made for the full cost of a project, except in exceptional circumstances. It is expected that organizations will support projects to the extent that they are able, and will seek further broad support as appropriate.

5. For Meetings, applications are not considered for: routine maintenance, painting, repairs to stone walls not part of the meeting house, horse sheds, or auxiliary buildings not used for religious purposes.

GRANT SIZE

Grants generally range from \$2,000 to \$20,000 for most applicants. Maximum grant size is \$80,000 for PYM Friends retirement facilities, \$20,000 for all other organizations. Amount may vary depending on the project, the need, and the availability of funds.

PRIORITIES

1. Non-routine capital projects, renovations, or unexpected expenses for which organizations have been unable to budget.
2. Projects that are clearly defined in scope and impact
3. Projects having either a definite termination or a source of subsequent support.
4. Projects that further the organization's mission and which could not happen without the grant.

APPLICATION PROCEDURES AND EXPECTATIONS

APPLICATION: All applicants must complete the Quaker Grantmaker Common Form ('Common Form') and the Financial Form appropriate to their organization. Download the forms online at www.pym.org/grants.

1. **Required Formats and Number of Copies:** One digital and one printed copy of all material are required, excepting audits and IRS Form 990s, for which only a digital copy is required (only organizations that are required to file IRS Form 990s must provide one here).
2. Applications will be considered to have met the deadline if either the digital copy or the printed copy is received by 5pm on the deadline date.
3. On the Common Form, Narrative, Section A, Question 3: Friends Retirement Homes should indicate which residents will benefit in terms of level of care - independent living/personal care/assisted living/nursing/hospice.
4. On the Common Form, Section 3: for building grants requests, in addition to the information requested in the Common Form, please also include by attachment both a 990 *and* an audit or financial report, not either/or, and
 - a. A description of all real estate owned by your Meeting/organization. Meetings and organizations having more than one structure on their property should clearly state for which building the grant is requested.
 - b. Contractors' proposal(s) and/or bid(s) for the work to be done.
 - c. A copy of your Meeting's/Organization's current Certificate of Insurance.
 - d. A list of groups that use the property for which the grant is requested, other than your own organization
5. **Project Budget:** On the Common Form required attachments list, a 'project budget' should be understood to include planned income as well as expenses, and should clearly show where the funds to pay for the project originate or are planned to originate. A project budget that lists only costs is incomplete.

The checklist at the end of this document may be helpful in confirming that your application is complete.

FUNDS

Charleston Fund: Grants for the construction or renovation (not maintenance) of Meeting Houses within the United States but outside of PYM.

Samuel T. Jeanes – meetinghouse purposes: Grants for repair or construction (not maintenance) of PYM Meeting Houses in active use.

#2 Anna T. Jeanes - Hospitals/Infirmarys: Grants for benefit of Friends Homes for aged with infirmarys

#3 Anna T. Jeanes - Stapeley Farm: Grants for support of Friends facilities for the elderly within PYM

#4 Anna T. Jeanes/Joseph Jeanes (merger): Grants to establish or maintain Friends facilities for the elderly within PYM

#5 Anna T. Jeanes/Joseph Jeanes: Grants to establish and assist Friends Homes for aged with infirmarys

Keeney Fund: Grants for non-recurring building expenses of Friends institutions

Mary Pusey Trust: Grants for existing Friends Homes for the elderly, Jeanes or Friends Hospital or other hospital under PYM (no hospitals currently exist), Friends Publishing Corporation (Friends Journal), Monthly Meetings for financial assistance in education of Young Friends (these grants are usually made to support PYM tuition aid program to Friends children in PYM Friends Schools), and AFSC social service in the USA.

Frank Scheibley Trust: Grants to establish, enlarge, or maintain Friends home for the aging.

Natalie Clifford Barney Trust: Grants for "carrying out...program[s] of planned parenthood (birth control)."

CONTACT

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Mail completed proposal to:
Quaker Buildings & Programs Granting Group
Philadelphia Yearly Meeting
1515 Cherry Street
Philadelphia, PA 19102

APPLICATION TIMELINE

1. Deadlines for application: February 1st and August 1st. If the 1st falls on a Saturday or Sunday, applications are due the Monday following. Applications received after the deadline will be held over until the following deadline for consideration.
2. Confirmation of application: After you apply, PYM staff will confirm that your application was received, and then review your application for completeness before passing it on to the Granting Group to consider for approval. You may be asked to submit additional material, to submit missing material, or to clarify aspects of your application if they are unclear.
3. The granting group may assign one or more of its members to conduct a site visit and/or to discuss your application with the person responsible for overseeing the project. This typically takes place between the application deadline and the 15th of the month following that deadline.
4. Decisions are made by the end of the March (spring applications) or September (autumn applications).
5. Grants are disbursed according to two different schedules depending on the applicant. In both cases, disbursement will be accompanied by a mailed grant letter describing the reporting requirements and the limits of the grant. Grant funds must be used for the purposes specified in the grant letter only. Granted funds not used within the reporting period for the specified purpose of the grant must be returned, unless an extension is requested by the grantee and approved by the Granting Group.
 - a. **Grants to Meetings** are normally distributed when the granted project is at least half complete and we have received documentation showing this in the form of paid invoices and matching canceled checks in sum of half the granted amount. If a grant is approved, you will have two years in which to request that the granted funds be distributed.
 - b. **Grants to all other organizations** are normally distributed when the granted project is approved. You must report on the grant within one year of approval.
6. Grant Reports are due within either one or two years from the date of application, as noted above. Reports may be published or excerpted on the PYM website. Electronic photographs of the project – before, during, and after – are much appreciated, and, if submitted, may be published on the PYM website. In your report, you will be asked to:
 - a. Evaluate the project using your criteria as stated in your application Narrative, Part B
 - b. Account for your use of the funds.
 - c. Describe the project's benefits to your facility and those you serve.
 - d. Explain what was accomplished that would not have happened without the grant.
 - e. Share what you've learned in this project that could benefit others.

APPLICATION CHECKLIST - FOR APPLICANT USE

Common Form

- Application Form
- Proposal: Summary Description
- Proposal: Narrative
- Finances: Project budget
- Finances: Operating budget (current year)
- Finances: Proposals/Bids (*if applicable*) - if a proposal/bid has been accepted, note which
- Finances: Financial Questionnaire [from Common Form]
- Finances: Most recent Audit or Annual Financial Report [Digital only] (*Meetings: If unaudited, please explain*)
- Finances: IRS Form 990: most recently filed [Digital only] (*for organizations required to file 990s only*)
- Attachments: Board List: List of board members/trustees/clerks
- Attachments: Minutes of support or letter(s) of supports (*optional*)
- Attachments: Minutes approving application (*Meetings only*)
- Attachments: IRS Federal tax-exemption letter (*excepting PYM Meetings and other affiliated organizations under PYM's group exemption policy, for which we already have this information on file*)
- Attachments: *Additional material requested by the committee, or that you wish to present to the committee*
 - If you are making an application in support of a project recently completed, we encourage (but do not require) applicants to report on the outcome of that project, per the reporting requirements for grant recipients, as part of the application – see Application Timeline on page 3, Items 5 and 6.

Additional Material Requested By The Quaker Buildings & Programs Granting Group

- Description of real estate owned by your organization (for building/maintenance/renovation grants)
- List of groups that use property (for building/maintenance/renovation grants)
- Contractors' proposal(s) and/or bid(s) for the work to be done (for building/maintenance/renovation grants)
- A copy of your Meeting's/Organization's current Certificate or Insurance (for building/maintenance/renovation grants)
- Attachments: Organization EIN