

# Quaker Grantmakers COMMON GRANT APPLICATION FORM

1) Granting organization to which you are applying \_\_\_\_\_ 2) Date of application: \_\_\_\_\_

May this application be shared with other granting organizations that might support this project?  YES  NO

3) Organization applying for grant \_\_\_\_\_

4) Organization address \_\_\_\_\_

5) Contact name \_\_\_\_\_ 6) Title \_\_\_\_\_

7) Contact address \_\_\_\_\_  
 same as organization \_\_\_\_\_

8) Phone: Day \_\_\_\_\_ Evening \_\_\_\_\_ 9) FAX \_\_\_\_\_

10) E-mail: \_\_\_\_\_ 11) website \_\_\_\_\_

12) If this organization is not itself a Quaker Monthly, Quarterly or Yearly Meeting, is it under the direct care of a Meeting?  
 YES  NO If yes, which one? \_\_\_\_\_

13) Grant checks should be payable to (organization) \_\_\_\_\_

14) Mail checks to (name) \_\_\_\_\_ 15) Title \_\_\_\_\_

16) Mail checks to (address) \_\_\_\_\_

17) Purpose of grant or project name \_\_\_\_\_

18) Amount requested \_\_\_\_\_ 19) Total project budget \_\_\_\_\_

20) Date funds are needed \_\_\_\_\_ 21) Project end date \_\_\_\_\_

22) Check all appropriate boxes:  One-time request  Applied before for this project  
 Expect to apply again for this project  Applied before for similar project (explain)

## IMPORTANT NOTE — READ THIS BEFORE APPLYING

**All granting organizations have specific guidelines! Download current forms at [www.pym.org/grants](http://www.pym.org/grants).**

- 1) Be clear about your goals and objectives and how they fit within the guidelines of the fund.
- 2) Confirm with the funder's contact person that you have current documents and whether application is appropriate.
- 3) Follow directions. Write clearly; exactly follow application format and order. Submit the required number of copies.
- 4) Do not skip questions unless they *in no way* apply to your request. In that case, indicate that is the reason.
- 5) Avoid repetition — less is more! Supporting materials above and beyond those requested may not be reviewed by committee members due to time constraints.

### ORGANIZATIONS THAT ACCEPT THIS COMMON FORM:

PYM Quaker Buildings & Projects Granting Group • PYM Membership Development Granting Group  
Thomas H. and Mary Williams Shoemaker Fund • Tyson Memorial Fund

Revised July 2016

\* Please refer to information sheet or guidelines from each fund for additional directions and requirements

**Download current application guidelines and forms at [www.pym.org/grants](http://www.pym.org/grants).**

**Quaker Grantmakers COMMON FORM INSTRUCTIONS**  
**ANSWER ALL QUESTIONS IN THE ORDER LISTED AND TITLE EACH SECTION.**

Please submit the required number of copies\* without binders, double-sided.

Applicants may be requested to provide additional material.

**All applicants, even if previously funded, need to include all of the following material.**

**PROPOSAL: Multiple copies may be required\***

- 1) **Summary description and reason for request** (*half-page maximum*) must be written on your organization's letterhead and signed by your Clerk, Executive Director, Board Chair, or leadership equivalent.
- 2) **Narrative** (*two sides of one page maximum*) answer all questions, in the order indicated and label them with both the number and question.

**A. Funding Request**

1. Why is this program or project needed?
2. What program or project objectives address the current need?
3. What individual(s) or group(s) would benefit?
4. Is any Quaker testimony or concern addressed by this proposal? Which one(s)?
5. List events and activities planned, with timetable for implementation and completion.
6. List key staff / volunteers involved and their roles, qualifications; Meeting membership where applicable.
7. Is there a sponsoring Friends Meeting, organization or group? Please identify.
8. How does the Meeting plan to contribute to this project?
9. Explain interactions with other organizations, if relevant.

**B. Evaluation**

1. How will you define success in the short term?
2. How will you define long-term success?
3. If you receive this grant, by what measures will you gauge success in your final report?

**ATTACHMENTS: Multiple copies may be required (check guidelines)\* — please attach in the following order**

1) **Finances**

**A. Project budget** with all potential and actual expenses and funding sources indicated. Please list all other funding sources applied to, amount requested, and status of your request: 1) *funding received*, 2) *grant approved*, 3) *decision pending*, or 4) *plan to apply*.

**B. Financial Questionnaire** (the appropriate one for your organization type)

**C. One the following** as electronic pdf via e-mail, in order of preference:

1. Organization's most recently filed IRS form 990
2. Most recent audit for organizations that do not file a tax return. *Please note reason that you are not required to file.*
3. Most recent annual financial report for organizations that do not file Forms 990 or conduct regular audits. *Please note reasons for this as part of your application.*

2) **Board of Directors**

**Organizations:** attach list of board members, including address, phone & Quaker Meeting membership, if any, of each board member. Please list only members of Quaker Meetings as Quakers.

**Friends Meetings:** attach list of Meeting's Clerk, other officers and Trustees, with contact information.

3) **Support Material**

**A. Minutes from Quaker Meeting(s)** — **Meetings** submit the Meeting's minute approving the application to the Granting Group. **Organizations** see fund guidelines or information sheet for required minutes of support from Quaker Meetings.

**B. Most recent IRS tax-exemption letter** showing current 501(c)(3) tax-exempt status and EIN number. PYM Meetings with tax exemption through or on file with PYM do not need to resubmit that information with the application; please note that this is the case when applying.

**C. Organizational mission statement**, if available

\* Please refer to information sheet or guidelines from each fund for additional directions and requirements

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*Quaker Grantmakers COMMON FORM*  
**Financial Questionnaire #1: for Quaker Meetings**

**Please attach a copy of this questionnaire to each copy of your proposal**

1. Meeting: \_\_\_\_\_ 2. Founded: \_\_\_\_\_ 3. Date of application: \_\_\_\_\_

4. Total adult members: \_\_\_\_\_ 5. Active adult members: \_\_\_\_\_ 6. Adult attenders: \_\_\_\_\_ 7. Youth under 18: \_\_\_\_\_

	<u>market value:</u>	<u>date of valuation:</u>
8. Outstanding mortgage or debt:	_____	_____
9. Endowment principal - unrestricted:	_____	_____
10. Endowment principal - restricted for graveyard care:	_____	_____
11. Endowment principal - restricted for education:	_____	_____
12. Endowment principal - restricted for other purposes:	_____	_____

	BUDGET	ACTUAL	
<b><u>REVENUE</u></b>	CURRENT Fiscal Year ____ - ____ (begin date - end date)	LAST Fiscal Year ____ - ____ (begin date - end date)	PRIOR Fiscal Year ____ - ____ (begin date - end date)
13. Contributions from members:	_____	_____	_____
14. Contributions from attenders:	_____	_____	_____
15. Investment income - unrestricted:	_____	_____	_____
16. Investment income - restricted for education:	_____	_____	_____
17.       “               for graveyard upkeep:	_____	_____	_____
18.       “               for care of the elderly:	_____	_____	_____
19. Investment income - restricted other:	_____	_____	_____
20. Other income:	_____	_____	_____
<b>21. GROSS INCOME</b>			
<b><u>EXPENSES</u></b>	CURRENT Fiscal Year ____ - ____ (begin date - end date)	LAST Fiscal Year ____ - ____ (begin date - end date)	PRIOR Fiscal Year ____ - ____ (begin date - end date)
22. Maintenance of graveyards and buildings:	_____	_____	_____
23. Meeting operating expenses (utilities, etc.):	_____	_____	_____
24. Meeting committee expenses:	_____	_____	_____
25. Meeting secretary or administration:	_____	_____	_____
26. Meeting contributions to PYM:	_____	_____	_____
27. Meeting contributions to Quarterly Meeting:	_____	_____	_____
28. Meeting contributions to other Friends causes:	_____	_____	_____
29. Meeting contributions to community causes:	_____	_____	_____
30. Mortgage or debt payments:	_____	_____	_____
31. Other expenditures:	_____	_____	_____
<b>32. TOTAL EXPENSES</b>			
<b>33. NET INCOME OR (LOSS)</b>			

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*Quaker Grantmakers COMMON FORM*  
**Financial Questionnaire #2: for Friends Schools**

**Please attach a copy of this questionnaire to each copy of your proposal**

1. School: \_\_\_\_\_ 2. Date Founded: \_\_\_\_\_ 3. Date of application: \_\_\_\_\_  
 4. Number of students: \_\_\_\_\_ 5. Grades \_\_\_\_\_ 6. Student/Teacher ratio: \_\_\_\_\_ 7. Quaker head?  YES  NO  
 8. Percentage of Quaker Students \_\_\_\_\_ % 9. Faculty \_\_\_\_\_% 10. Other staff \_\_\_\_\_% 11. Number of persons on School  
 Committee: \_\_\_\_\_ 12. Total number of contributors to annual appeal: \_\_\_\_\_

	market value:	date of valuation:
13. Endowment principal - unrestricted:	_____	_____
14. Endowment principal - restricted:	_____	_____
15. Outstanding mortgage or debt:	_____	_____

	BUDGET	ACTUAL	
<u>REVENUE</u>	CURRENT Fiscal Year _____-_____ (begin date – end date)	LAST Fiscal Year _____-_____ (begin date – end date)	PRIOR Fiscal Year _____-_____ (begin date – end date)
16. Tuition:	_____	_____	_____
17. Contributions from annual appeal:	_____	_____	_____
18. Income from restricted funds:	_____	_____	_____
19. Income from unrestricted funds:	_____	_____	_____
20. Income from PYM:	_____	_____	_____
21. Other Income:	_____	_____	_____
<b>22. GROSS INCOME</b>	_____	_____	_____
<u>EXPENSES</u>	CURRENT Fiscal Year _____-_____ (begin date – end date)	LAST Fiscal Year _____-_____ (begin date – end date)	PRIOR Fiscal Year _____-_____ (begin date – end date)
23 Administration - non teaching salaries & admissions:	_____	_____	_____
24. Education – teaching salaries, curriculum & materials:	_____	_____	_____
25. Operating expenses – maintenance salaries, physical plant & student services:	_____	_____	_____
26. Fundraising expenses – development office, alumni relations, campaign & events:	_____	_____	_____
27. Depreciation:	_____	_____	_____
28 Debt service:	_____	_____	_____
29. Other expenses:	_____	_____	_____
<b>32. TOTAL EXPENSES</b>	_____	_____	_____
<b>33. NET INCOME OR (LOSS)</b>	_____	_____	_____

*Quaker Grantmakers COMMON FORM*  
**Financial Questionnaire #3: for FRIENDS RETIREMENT FACILITIES**

**Please attach a copy of this questionnaire to each copy of your proposal**

1. Facility Name as it appears on 501(c) (3) IRS ruling letter: \_\_\_\_\_ 2. Founded: \_\_\_\_\_  
 3. Date of application: \_\_\_\_\_ 4. Organization's last Fiscal Year End date: \_\_\_\_\_ 5. Levels of care offered at your facility:

	Residents	Administrators	Other Staff	Board Members
6. TOTAL current number of:				
7. Number who are Quakers:*				

*\*Please count only actual members of Quaker Meetings as Quakers*

- (check below all that apply)
- Independent Living
- Personal Care
- Assisted Living
- Nursing
- Hospice

	Individuals	Meetings	Foundations/ Other	Specify "Other":
8. Number of contributors to facility last fiscal year:				
9. Amount contributed last fiscal year by category:				

**market value: \_\_\_\_\_ date of valuation: \_\_\_\_\_**

10. Endowment principal - unrestricted: \_\_\_\_\_
11. Endowment principal - restricted: \_\_\_\_\_
12. Outstanding mortgage or debt: \_\_\_\_\_

**BUDGET ACTUAL**

	CURRENT Fiscal Year ____ - ____ (begin date - end date)	LAST Fiscal Year ____ - ____ (begin date - end date)	PRIOR Fiscal Year ____ - ____ (begin date - end date)
<b><u>REVENUE</u></b>			
13. Resident fees:	_____	_____	_____
14. Contributions from annual appeal:	_____	_____	_____
15. Income from restricted funds:	_____	_____	_____
16. Income from unrestricted funds:	_____	_____	_____
17. Income from endowed resident assistance funds:	_____	_____	_____
18. Income from PYM:	_____	_____	_____
19. Other Income:	_____	_____	_____
20. GROSS INCOME			
<b><u>EXPENSES</u></b>			
21. Administration:	_____	_____	_____
22. Care of residents:	_____	_____	_____
23. Operating expenses:	_____	_____	_____
24. Unfunded resident assistance - from current monies:	_____	_____	_____
25. Depreciation:	_____	_____	_____
26. Debt service:	_____	_____	_____
27. Other expenses:	_____	_____	_____
28. TOTAL EXPENSES			
29. NET INCOME OR (LOSS)			

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*Quaker Grantmakers COMMON FORM*

**Financial Questionnaire #4: for ORGANIZATIONS**

other than FRIENDS SCHOOLS, FACILITIES FOR THE AGING and MEETINGS

**Please attach a copy of this questionnaire to each copy of your proposal**

1. Organization: \_\_\_\_\_ 2. Founded: \_\_\_\_\_ 3. Date of application: \_\_\_\_\_  
 4. Number of employees (full-time equivalents): \_\_\_\_\_ 5. Board members: \_\_\_\_\_ 6. Contributors to annual appeal: \_\_\_\_\_  
 7. Number of Quakers active in organization: \_\_\_\_\_ 8. Percentage of Quakers on Board: \_\_\_\_\_% 9. on Staff: \_\_\_\_\_%

Provide information IN U. S. DOLLARS. *If based on another currency, exchange rate: \$1 = \_\_\_\_\_*

	<u>market value:</u>	<u>date of valuation:</u>
10. Endowment and Trust principal - unrestricted:	_____	_____
11. Endowment and Trust principal - restricted:	_____	_____
12. Outstanding mortgage or debt:	_____	_____

	<b>BUDGET</b>	<b>ACTUAL</b>	
<b><u>REVENUE</u></b>	CURRENT Fiscal Year _____-_____ (begin date – end date)	LAST Fiscal Year _____-_____ (begin date – end date)	PRIOR Fiscal Year _____-_____ (begin date – end date)
13. Fees for goods and services:	_____	_____	_____
14. Contributions:	_____	_____	_____
15. Grant income:	_____	_____	_____
16. Income from restricted funds:	_____	_____	_____
17. Income from unrestricted funds:	_____	_____	_____
18. Other Income:	_____	_____	_____
<b>19. GROSS INCOME</b>			
<b><u>EXPENSES</u></b>	CURRENT Fiscal Year _____-_____ (begin date – end date)	LAST Fiscal Year _____-_____ (begin date – end date)	PRIOR Fiscal Year _____-_____ (begin date – end date)
20. Administration:	_____	_____	_____
21. Program costs:	_____	_____	_____
22. Operating expenses:	_____	_____	_____
23. Fundraising expenses:	_____	_____	_____
24. Depreciation:	_____	_____	_____
25. Debt service:	_____	_____	_____
26. Other expenses:	_____	_____	_____
<b>27. TOTAL EXPENSES</b>			
<b>28. NET INCOME OR (LOSS)</b>			

\* Please refer to information sheet or guidelines from each fund for additional directions and requirements