



Edward T. McPhee Jr.  
President, Director  
Carole T. McPhee  
Vice President, Director  
Marie C. Popielarczyk  
Treasurer, Director  
Michael Jacob McPhee  
Secretary, Director

Maureen M. Lee  
Director  
Barbara A McPhee  
Director  
Rita G.McPhee  
Director  
Robin McPhee  
Director

## Grant Application

**DEADLINE JULY 31<sup>st</sup>**

Date of Application:

Name of applying Organization (the "Organization):

Address:

Web address:

Telephone:

Executive Director:  e-mail:

Contact Person:  e-mail:

Project Name:

Amount of Request: \$

Short explanation of the project the grant will fund:

**THE MCPHEE FOUNDATION INC. • 44 BELGIAN CIRCLE • BRISTOL, CT 06010-8967**

Mission Statement: TheMcPhee Foundation is a private family organization. Our vision is to support charities, children and families, and research in order to promote a better quality of life.

**Grant Application**



**Please Email the Following Exhibits as Separate Attachments with this Application:**

Exhibit 1: List of Board of Directors.

Exhibit 2: A copy of the Organization's tax exemption letter from the Internal Revenue Service, as well as, a copy of the IRS determination that it is not a private foundation. Has there been any determination by the Internal Revenue Service which adversely affects the favorable tax status reported in these letters, and/or changes in the nature of the Organization's activities since receipt of the above letters? If so, please describe in detail.

Exhibit 3: A detailed explanation of the proposed use of the requested grant. Please include the following in the response:

- a) Short term measurable objectives/milestones against which you will be able to compare and evaluate results at the end of the grant program.
- b) Activities and steps that will be taken to achieve the program's objectives/milestones.
- c) Whether your organization plans on providing other funds to support the program this grant would fund.

Exhibit 4: A short, one or two paragraph, description, history, and mission of the applying organization.

Exhibit 5: An Itemized Budget identifying the projected expenses and income of the project.

Exhibit 6: The last two years of the Audited Year End Balance Sheet and Profit and Loss Report.

**Please Fill Out Additional Grant Information Below:**

Total Budget for the program: \$

Total Administrative Expenses for the program: \$

Total Organizational budget: \$

Where will the Funds received be kept until expenditure?

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COMMITMENTS BY ORGANIZATION

If the proposed grant is made, the Organization agrees to promptly provide any information and make any reports that The McPhee Foundation, Inc. may require (including Article 6 above).

If the proposed grant is made, the Organization agrees to promptly repay The McPhee Foundation, Inc., upon demand, the unexpended amount of said grant if any of the following events should occur (the determination that any of the following has occurred, or as otherwise specified, is in the complete and sole discretion of The McPhee Foundation, Inc.).

- a) A determination (preliminary or otherwise) by the Internal Revenue Service that such grant is inappropriate for The McPhee Foundation, Inc., i.e., that it constitutes a “taxable expenditure” or does not constitute a “qualifying distribution”.
- b) Failure of the Organization to properly conform to the required reporting procedures.
- c) A change in the activities of the Organization which may affect the nature of its exempt status.
- d) Failure to expend the grant as indicated in this application.
- e) This grant application, or required report to The McPhee Foundation Inc. is found to be inaccurate in any material respect.
- f) Grant endowment funds must be used within one (1) year of date of issue.

Date:

Organization:

Name:

Title:

Signature:

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**PLEASE NOTE: Electronic Submissions Only Send to [applications@mcpheefoundation.org](mailto:applications@mcpheefoundation.org)**

Please save with the following nomenclature and attach files in email as follows:

- Organization Name\_Grant Application
- Organization Name\_Grant Application\_Exhibit 1
- Organization Name\_Grant Application\_Exhibit 2
- Organization Name\_Grant Application\_Exhibit 3
- Organization Name\_Grant Application\_Exhibit 4
- Organization Name\_Grant Application\_Exhibit 5
- Organization Name\_Grant Application\_Exhibit 6

If you have any questions please email The McPhee Foundation, Inc [applications@mcpheefoundation.org](mailto:applications@mcpheefoundation.org)

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