

**HAROLD AND GRACE UPJOHN FOUNDATION
300 S. WESTNEDGE AVENUE
KALAMAZOO, MI 49007
(269) 385-0439**

APPLICATION INFORMATION

A review of the most current Foundation Annual Report, which is enclosed, provides general information which will be helpful in completing the application request for funding.

The enclosed Grant Application Form must be completed and submitted. It may be duplicated or retyped using the same format and spacing.

ACCEPTANCE PERIOD:

The Foundation will accept grant applications only during two periods each year as follows:

	<u>Time Period</u>	<u>Deadline Date</u>	<u>Trustees Meeting</u>
1.	Month of March	April 1	Spring
2.	Month of August	September 1	Fall

Applications must be dated within the acceptance period so information presented will be current. Application must be submitted to the address below by 4:00pm on the deadline date to be considered.

APPLICATION INSTRUCTIONS:

1. Please furnish one original (paper clipped) plus six (6) copies (collated and stapled) of all material presented--except where only one copy is specified.
2. Include requisite number of copies as follows:
 - a) Cover letter (*signed by authorized officer of organization*)
 - b) Completed Grant Application Form (*signed by authorized officer of organization*)
 - c) A list of officers and board of directors or trustees (*include occupations*)
 - d) A one-page budget for the amount requested
 - e) Current organization budget
 - f) Organizations nondiscrimination policy statement (required)
 - g) Letters of support, if any
 - h) One (1) copy of IRS letter confirming 501(c)(3) tax status (*include with paper clipped copy*)
 - i) One (1) copy of most recent audited financial statement (*include with paper clipped copy*)
3. Please limit your Application Package [*(a) through (f) above*] to no more than twelve (12) pages.
4. Completed fund requests should be sent to:

**Don Edgerly, Secretary
Harold and Grace Upjohn Foundation
300 S. Westnedge Avenue
Kalamazoo, MI 49007**

**THE HAROLD AND GRACE UPJOHN FOUNDATION
GRANT APPLICATION FORM**

SECTION A: ORGANIZATION INFORMATION

Date: _____

Name of Organization _____

Address _____ City _____ State _____ Zip _____

Contact Person: _____ Phone: _____

Authorized Officer Name & Title: _____

Year founded: _____

Brief description, objective and function of organization:

- Staff: # Professionals _____ # Volunteers _____ # Clerical _____
- Is organization determined by IRS to be a section 501(c)(3) organization? _____
- Is applicant a unit of government? _____
- Is organization affiliated with any religious organization? _____
- Does organization engage in any form of proselytizing (religious conversion)? _____
- Does organization affirm that it does not discriminate on the basis of race, color, religion, creed, national origin, ancestry, disability, gender, sexual orientation or age with regard to employees, volunteers, members, clients, and contractors? _____
- Does organization collaborate with other organizations in the same field of interest? _____

Financial: Annual Operating Budget: \$ _____
Endowment Fund: \$ _____
Net Worth: \$ _____
Fixed Asset Value \$ _____
(buildings, land, equipment, etc.)

SECTION B: FUND REQUEST INFORMATION

\$ _____
Amount Requested

\$ _____
Total Project Cost

Purpose for which funds are requested:

Authorized Officer:

Signature

Name & Title

SECTION B (Contd.):

Questions:

1. What is the demonstrated need for this project?

2. Are you collaborating with any other organization on this project, and if so, with whom?

3. How many individuals or families will be served?

4. If this will be a continuing project, what is your anticipated source of funding in subsequent years?

5. If this Foundation does not approve your request for funds, what alternative plan will you follow?

6. If you do not receive sufficient funds from other sources, what alternate plan will you follow?

7. What other funding sources are you applying to for assistance with this project?

8. How and when do you plan to evaluate the success of your project and report your finding to this Foundation?