

Chi Phi Educational Trust

# CEF GRANT RECOMMENDATION FORM

Updated February 8, 2016

**Introduction:** Donors contribute to Chapter Excellence Funds to provide scholarships and educational grants to the members of a particular Chapter. Pursuant to Trust policy, Alumni Association officers have until 30 days prior to the end of the Trust's fiscal year to make recommendations to the Trust on the use of available funds for scholarship and educational purposes (or other purposes consistent with its mission and meeting the criteria for a 501(c)(3) organization) or for transfer into the CEF's corresponding Temporarily Restricted - Accumulating Fund. However, the Trust shall have ultimate decision authority based on IRS regulations. Funds transferred into the Temporarily Restricted - Accumulating Fund may accumulate over time. A portion is made available every year for spending out of the CEF's Temporarily Restricted – Available Fund. Temporarily Restricted – Available funds that are not spent by June 30, may be awarded by the Trust to members of your Chapter in the form of scholarships or educational grants.

**Instruction:** To make a recommendation about spending from a Temporarily Restricted – Available Fund, please complete the information below and on page two and submit to the Chi Phi Educational Trust between July 1 and May 30 via email at [forbes@chphi.org](mailto:forbes@chphi.org) or fax to 404.237.5090.

Chapter / CEF Name	
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The Alumni Association listed below recommends that the Chi Phi Educational Trust spend funds from the above-listed CEF's Temporarily Restricted - Available account based on the summary information appearing below and the more detailed information appearing on page two.

Program Area to Fund <i>Complete detailed information on page two</i>	Amount Recommended
Academic Scholarships	\$
Scholarships to Attend Leadership Programs	\$
Other Educational Grant	\$
Transfer into the CEF's Accrual Restricted Fund	\$
<b>Total</b>	<b>\$</b>

As an officer of the \_\_\_\_\_ Chapter Alumni Association, I hereby certify these funds will be used for the purposes stated above.

\_\_\_\_\_  
Signature Date

\_\_\_\_\_  
Printed Name Title within the Alumni Association

**Academic Scholarships:** Please list all academic scholarship recipients below, each recipient's mailing address and the amount you recommend each recipient receive. (CPET will mail all scholarship checks directly to the recipient.)

*Example: John Q. Sample, 123 Main St. Atlanta, GA 12345 - \$500*

**Scholarships to Attend Leadership Programs:** Please identify the leadership program (College of Excellence, Regional Leadership Alliance, UIFI, etc.), the recipients and amount you recommend each recipient receive. Attach program information for non-Chi Phi-related programs.

*Example 1: Beta Beta would like to send John Sample and Chris Illustration to the Undergraduate InterFraternity Institute. Registration costs \$200 per attendee. We request \$400 to pay for 2 UIFI registrations. Please send the funds to John Q. Sample, Beta Beta Alumni Association Treasurer, 123 Main St. Atlanta, GA 12345.*

*Example 2: Epsilon Sigma would like to send its chapter president to the College of Excellence. COE registration is \$500. Please send the registration funds to the Chi Phi Fraternity to pay for the registration of James President.*

**Other Educational Grant:** Please identify any other educational grant permitted under IRS regulations that you recommend the Trust make. Please describe the grant in detail, demonstrate the educational purpose, identify any grant recipients and the amount(s) you recommend be awarded. Please be prepared to provide additional information should the Trust have any questions.

**Transfer into the CEF's Temporarily Restricted - Accumulating Fund.** Identify the amount of any funds in the CEF's Temporarily Restricted - Available Fund that you recommend not be spent but rather transferred back into the CEF's Temporarily Restricted - Accumulating Fund so that it is made available for future spending.

Transfer:  All available funds from the Available account to the Accumulating account.

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