

TAX RETURN FILING INSTRUCTIONS

FORM 990-PF

FOR THE YEAR ENDING

JUNE 30, 2019

Prepared for	THE P & G ALUMNI FOUNDATION, INC. 1708 MARTHA AVENUE CINCINNATI, OH 45223
Prepared by	BURKE & SCHINDLER, PLL 901 ADAMS CROSSING CINCINNATI, OH 45202
Amount due or refund	BALANCE DUE OF \$2
Make check payable to	PAYMENTS SHOULD BE MADE USING THE ELECTRONIC FEDERAL TAX PAYMENT SYSTEM (EFTPS).
Mail tax return and check (if applicable) to	DEPARTMENT OF THE TREASURY INTERNAL REVENUE SERVICE CENTER OGDEN, UT 84201-0027
Return must be mailed on or before	NOVEMBER 15, 2019
Special Instructions	THE RETURN SHOULD BE SIGNED AND DATED. PLEASE NOTE THAT THE FORM 990-PF RETURN CONTAINS EXCESS DISTRIBUTION CARRYOVER OF \$226,087. THIS MAY BE APPLIED TO TAX YEAR 2019 AND SUBSEQUENT YEARS.

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No. 1545-0052

2018

Open to Public Inspection

Department of the Treasury
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2018 or tax year beginning JUL 1, 2018, and ending JUN 30, 2019

Name of foundation THE P & G ALUMNI FOUNDATION, INC.		A Employer identification number 45-3765318
Number and street (or P.O. box number if mail is not delivered to street address) 1708 MARTHA AVENUE	Room/suite	B Telephone number 443-540-7639
City or town, state or province, country, and ZIP or foreign postal code CINCINNATI, OH 45223		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 55,241.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	0.		N/A	
	2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	109.	109.		STATEMENT 1
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	109.	109.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees STMT 2	2,950.	0.		0.
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 3	172.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	3,122.	0.		0.
	25 Contributions, gifts, grants paid	40,000.			40,000.
	26 Total expenses and disbursements. Add lines 24 and 25	43,122.	0.		40,000.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-43,013.				
b Net investment income (if negative, enter -0-)		109.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only.

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	18,470.	15,517.	15,517.
	2 Savings and temporary cash investments	75,378.	39,724.	39,724.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶	4,406.		
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	98,254.	55,241.	55,241.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ... ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	98,254.	55,241.	
30 Total net assets or fund balances	98,254.	55,241.		
31 Total liabilities and net assets/fund balances	98,254.	55,241.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	98,254.
2 Enter amount from Part I, line 27a	2	-43,013.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	55,241.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	55,241.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b NONE			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	}	3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
 If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	15,000.	99,907.	.150140
2016	84,660.	129,129.	.655623
2015	40,000.	95,048.	.420840
2014	68,999.	55,241.	1.249054
2013	76,999.	75,596.	1.018559

2 Total of line 1, column (d)	2	3.494216
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.698843
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	73,427.
5 Multiply line 4 by line 3	5	51,314.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1.
7 Add lines 5 and 6	7	51,315.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	40,000.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	2.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	2.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2.
6 Credits/Payments:			
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a	0.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	0.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	2.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> OH		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address ► PGALUMNIFOUNDATION.ORG		
14 The books are in care of ► RICHARD BEAGLE Telephone no. ► 410-243-4821		
Located at ► 1708 MARTHA AVENUE, CINCINNATI, OH ZIP+4 ► 45223		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		<input type="checkbox"/>
and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	N/A	
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

	Yes	No
5a During the year, did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A	5b
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No	
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b X
If "Yes" to 6b, file Form 8870.		
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 5		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	74,545.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	74,545.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	74,545.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,118.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	73,427.
6	Minimum investment return. Enter 5% of line 5	6	3,671.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	3,671.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	2.
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,669.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	3,669.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	3,669.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	40,000.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	40,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	40,000.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				3,669.
2 Undistributed income, if any, as of the end of 2018:				
a Enter amount for 2017 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013	73,221.			
b From 2014	66,239.			
c From 2015	35,304.			
d From 2016	78,205.			
e From 2017	10,008.			
f Total of lines 3a through e	262,977.			
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 40,000.				
a Applied to 2017, but not more than line 2a ...			0.	
b Applied to undistributed income of prior years (Election required - see instructions) ...		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				3,669.
e Remaining amount distributed out of corpus	36,331.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	299,308.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr. ...			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	73,221.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	226,087.			
10 Analysis of line 9:				
a Excess from 2014 ...	66,239.			
b Excess from 2015 ...	35,304.			
c Excess from 2016 ...	78,205.			
d Excess from 2017 ...	10,008.			
e Excess from 2018 ...	36,331.			

Part XV Supplementary Information (continued)**3** Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution * *	Amount
a Paid during the year				
NUOVI ORIZZONTI T. LANDOLFI, 300 03100 FROSINONE, ITALY		PUBLIC CHARITY	TO FUND A GRANT TO SUPPORT ITS INNOVATIVE "ICE CREAM FOR A DREAM" PROJECT WHICH IT PLANS TO LAUNCH IN	20,000.
HARPENDEN SPOTLIGHT ON AFRICA 15 SAXON ROAD WELWYN, HERTS, UNITED KINGDOM AL6 9JR		PUBLIC CHARITY	TO FUND A GRANT USED TO SUPPORT HSOA'S NEW TAILORING & DESIGN CENTER, PROVIDING VOCATIONAL TRAINING	20,000.
Total			3a	40,000.
b Approved for future payment				
NONE				
Total			3b	0.

Part XVII

Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | | |
|---|-------|-----|----|
| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | Yes | No |
| a Transfers from the reporting foundation to a noncharitable exempt organization of: | | | |
| (1) Cash | 1a(1) | | X |
| (2) Other assets | 1a(2) | | X |
| b Other transactions: | | | |
| (1) Sales of assets to a noncharitable exempt organization | 1b(1) | | X |
| (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | | X |
| (3) Rental of facilities, equipment, or other assets | 1b(3) | | X |
| (4) Reimbursement arrangements | 1b(4) | | X |
| (5) Loans or loan guarantees | 1b(5) | | X |
| (6) Performance of services or membership or fundraising solicitations | 1b(6) | | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | X |
| d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | |

[illegible]

- 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

May the IRS discuss this return with the preparer shown below? See instr.

☒ Yes ☐ No

Signature of officer or trustee

Date _____

TREASURER

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature _____

Date _____

Check ☐ if
self-employed

PTIN

JAKE BURKE

Firm's name ► **BURKE & SCHINDLER, PLL**

Firm's address ► 901 ADAMS CROSSING
CINCINNATI, OH 45202

Firm's EIN ► 31-1452011

Phone no. (513) 455-8200

Form 990-PF (2018)

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - NUOVI ORIZZONTI

TO FUND A GRANT TO SUPPORT ITS INNOVATIVE "ICE CREAM FOR A DREAM" PROJECT WHICH IT PLANS TO LAUNCH IN MARCH 2019. THE GRANT WILL BE USED TO PURCHASE EQUIPMENT FOR THE ICE-CREAM WORKSHOP, AS WELL AS ICE CREAM SUPPLIES, AND HELP SUPPORT TRAINING IN LIFE SKILLS AND PROFESSIONAL GUIDANCE, AND ENTREPRENEURSHIP BUSINESS SKILLS. THE ORGANIZATION'S MISSION CONSISTS OF TRAINING 20 REHABILITATED DRUG ADDICTS AGES 18 - 29 IN YEAR I WHO HAVE SUCCESSFULLY COMPLETED THE THERAPEUTIC PROGRAM, IN THE ART OF MAKING AND SELLING ARTISANAL ICE CREAM. THE COURSE COVERS THEORETICAL AND PRACTICAL TRAINING INCLUDING MAKING ARTISAN ICE-CREAMS, PROCESSING RAW MATERIALS, AND THE USE, MAINTENANCE AND CLEANING OF APPLIANCES. THE PROJECT AIMS TO HAVE 16 PEOPLE GAINFULLY EMPLOYED BY THE END OF THE YEAR, WITH 10 OF THEM RUNNING THEIR OWN BUSINESS.

NAME OF RECIPIENT - HARPENDEN SPOTLIGHT ON AFRICA

TO FUND A GRANT USED TO SUPPORT HSOA'S NEW TAILORING & DESIGN CENTER, PROVIDING VOCATIONAL TRAINING AND EMPLOYMENT PRIMARILY FOR WOMEN IN BUKASAKYA (EASTERN UGANDA). BUKASAKYA HAS SEEN A SHARP INFLUX OF REFUGEES FROM NEIGHBORING, WAR-RAVAGED SOUTH SUDAN. RANKED 131ST IN THE WORLD FOR UNEMPLOYMENT, HOUSEHOLD INCOME IN UGANDA IS AMONG THE LOWEST 10% IN THE WORLD. WITH HIGH MORTALITY AND LITTLE OPPORTUNITY FOR EMPLOYMENT, THE GRANT FUNDS WILL BE USED TO FULLY EQUIP THE TAILORING AND DESIGN CENTER, AS WELL AS COVER FABRIC AND OPERATOR TRAINING COSTS WORKING IN PARTNERSHIP WITH AN EXISTING TAILORING BUSINESS. THE PROJECT IS ESTIMATED TO CREATE A BUSINESS CO-OP TRAINING 300+ INDIVIDUALS IN THE FIRST 5 YEARS, IMPACTING 3,600 COMMUNITY MEMBERS, WITH A READY MARKET COMPRISED OF SCHOOL UNIFORMS AND OTHER NECESSARY GARMENTS.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
PNC BANK	109.	109.	
TOTAL TO PART I, LINE 3	109.	109.	

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	2,950.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	2,950.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGES	172.	0.		0.
TO FORM 990-PF, PG 1, LN 23	172.	0.		0.

FOOTNOTES STATEMENT 4

PART VII-A LINE 8B:

PURSUANT TO RECENT CHANGES TO THE ADMINISTRATIVE RULES AND REGULATIONS OF OHIO'S CHARITABLE TRUST ACT, NO COPY OF FORM 990-PF HAS BEEN FILED WITH OHIO. ADMINISTRATIVE RULES NOW ALLOW ORGANIZATIONS HEADQUARTERED IN OHIO TO SUBMIT A "VERIFICATION OF FILING WITH THE INTERNAL REVENUE SERVICE" FORM IN LIEU OF THE FEDERAL TAX RETURN, ALONG WITH ANY APPLICABLE FILING FEE.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	5
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
HARI NAIR 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 1.00	0.	0.	0.
SUE WILKE 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 4.00	0.	0.	0.
THOMAS DRUM 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 3.00	0.	0.	0.
ED TAZZIA 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 2.00	0.	0.	0.
MOHAN MOHAN 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 3.00	0.	0.	0.
DEBORAH M. KIELTY 1708 MARTHA AVENUE CINCINNATI, OH 45223	CHAIRMAN 6.00	0.	0.	0.
JENNIFER TING 1708 MARTHA AVENUE CINCINNATI, OH 45223	PRIOR TREASURER 6.00	0.	0.	0.
NISHANT SAXENA 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 1.00	0.	0.	0.
PATRICIA MCKAY 1708 MARTHA AVENUE CINCINNATI, OH 45223	SECRETARY 10.00	0.	0.	0.
CHRIS HESSLER 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 2.00	0.	0.	0.
MARGARET SZEMPRUCH 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 6.00	0.	0.	0.

JESSICA HALL 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 3.00	0.	0.	0.
ERIC VANDERSCHUEREN 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 1.00	0.	0.	0.
VINCE SPIZIRI 1708 MARTHA AVENUE CINCINNATI, OH 45223	VICE CHAIRMAN 4.00	0.	0.	0.
MARIANNE IYER 1708 MARTHA AVENUE CINCINNATI, OH 45223	EXECUTIVE DIRECTOR 20.00	0.	0.	0.
IDA ABDALKHANI 1708 MARTHA AVENUE CINCINNATI, OH 45223	TRUSTEE 2.00	0.	0.	0.
RICK BEAGLE 1708 MARTHA AVENUE CINCINNATI, OH 45223	TREASURER 4.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT	6
	PART XV, LINES 2A THROUGH 2D		

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

SEE ATTACHED P&G ALUMNI FOUNDATION 2018 GRANT APPLICATION DOCUMENT

EMAIL ADDRESS

PHILANTHROPY@PGALUMS.COM

FORM AND CONTENT OF APPLICATIONS

SEE ATTACHED P&G ALUMNI FOUNDATION 2018 GRANT APPLICATION DOCUMENT

ANY SUBMISSION DEADLINES

SEE ATTACHED P&G ALUMNI FOUNDATION 2018 GRANT APPLICATION DOCUMENT

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE P&G ALUMNI FOUNDATION DOES NOT RESTRICT GRANTS TO ANY PARTICULAR GEOGRAPHY OR TYPE OF ORGANIZATION. WE DO REQUIRE THAT GRANTS FIT OUR MISSION OF ECONOMIC EMPOWERMENT, AND LOOK FOR OPPORTUNITIES TO GIVE TO ORGANIZATIONS AROUND THE WORLD THAT FURTHER OUR MISSION.



Sharing values. Investing together.
Creating opportunity.

2018 P&G Alumni Foundation Grant Cycle

P&G Alumni Foundation

Application: Instructions & Guidelines

Congratulations! You are invited to apply for a 2018 P&G Alumni Foundation Grant.

Our Grants Committee will review all completed applications and notify you as to our final grant decisions.

Please review thoroughly the following: timing, guidelines, information on prepopulated responses, eligibility requirements & vetting procedures **before** starting your application.

TIMING	
Grant Applications Due	No later than Monday, September 17, 2018
Vetting Process: · International applicants complete due diligence	Mid-Sept / Oct 2018
· U.S. registered 501(c)(3) organizations undergo GuideStar Charity Check	During Application Review & Prior to Awarding Grant
Award Winners Notified by	By Jan 2019

Guidelines

A. The amount available for grant-making in 2018 is approximately \$175,000. Individual grant awards are expected to be in the \$10,000- \$25,000 range.

B. Grants applications are due no later than Monday, September 17, 2018 and must be submitted online through our grants portal with Foundant.

C. Any questions, please contact:

- For content questions: Sue Wilke, Grants Committee, at suewilke@cinci.rr.com
- For Foundant or submission specific questions: please contact Marianne Iyer, Executive Director, @ marianne.iyer@pgalums.com

D. Carefully review the Eligibility Requirements, Prepopulated Responses & Vetting Procedures sections. These requirements must be met to receive a grant if awarded.

E. **Read questions carefully.** Many questions ask for information specific to the program / project seeking funding (vs. the entire organization).

Prepopulated Responses

Answers to questions asked on the LOI and again here in this application will prepopulate herein. You can choose to edit / update these answers. However, your changes should **not fundamentally change** the intent of what was included in the LOI. For example, you can update or provide additional details, but you can't change the program / project for which you are seeking funding.

Eligibility Requirements

The P&G Alumni Foundation accepts grant requests from tax-exempt 501(c)(3) organizations in the U.S. or from charitable equivalents outside the U.S. subject to the following eligibility requirements.

1. Your organization's mission and the project or program seeking funding must be strongly aligned with the Foundation's mission of economically empowering those in need.

Mission

The P&G Alumni Foundation improves quality of life by economically empowering individuals in need to achieve greater financial independence and economic well-being for themselves, their families and their communities around the world.

Through strategic grant-making to established charitable organizations with significant P&G Alumni involvement, the P&G Alumni Foundation invests in programming that contributes toward sustainable employment opportunities including:

- * Job skills development & vocational training
- * Business-related skills education & training
- * Entrepreneurial or business ventures viable in local communities

2. Your proposal must demonstrate how it contributes toward sustainable employment opportunities (examples provided above in the Mission) and how you will measure results.

3. One or more P&G Alumni must be actively and meaningfully involved with the charitable organization, project or program requesting funding for a minimum of one year. An Alumnus must provide an endorsement letter as part of this application and sign off on the final grant award review.

4. The charitable organization must be in existence for a minimum of two fiscal years and be able to submit financial statements upon request (financials need not be audited). We assess financial stability & organizational sustainability.
5. If awarded a grant, the recipient organization must submit a final progress report.
6. Grants are annual awards and limited to one-year commitments. There is no stipulated limit as to the % of funding a grant request can be relative to the total project or program costs.

Vetting Procedures

Nonprofits registered in the U.S. are subject to ensuring compliance with IRS regulations governing 501(c)(3) organizations including a review of the GuideStar Charity Check. International charitable organizations not registered in the U.S. are required to complete due diligence as prescribed by the Grants Committee prior to receiving a grant award if selected.

- This due diligence will continue to ensure that our grant partners are performing their charitable work in a transparent and accountable manner while meeting registration requirements with local governments.
- Information to complete the due diligence should be easily accessible by the nonprofit and ordinary in nature. There is no cost to the nonprofit for completing the due diligence review process.

Bookmark, Tutorials & Downloading

1. Bookmark the Log On page for ease of access.
2. You are able to save as you go and submit once complete.
3. Reference the Video & Written tutorials on the Log On page for detailed instructions.
4. You can download the proposal at any stage of completion (to save to your computer or print a hard copy) by using the Question List button. Refer to the tutorials for specific instructions.

A. Organization & P&G Alumnus Sponsor

State Organization's Mission*

Character Limit: 500

List Primary Programs**Character Limit: 2000***Indicate geographic area(s) where your organization's program activities are provided****Character Limit: 250***Annual Operating Budget (in USD)****Character Limit: 20***Endowment Size (in USD)***if applicable**Character Limit: 20***P&G Alumnus Co-Signing LOI / Application***

Name of the P&G Alumnus supporting this grant request and co-signing the application. If more than one P&G Alumni are involved with the organization, name ONLY the lead Alum who will serve as the primary contact. Any additional Alums (if applicable) can be listed & discussed in the related question in Section F.

*Character Limit: 250***Current Title & Company***

For the P&G Alumnus co-signing the application, please provide his / her current title and the name of the company or organization where he / she works. If not applicable, please simply indicate.

*Character Limit: 250***# of Years at P&G****Character Limit: 4***Function(s) at P&G***

Specify the function(s) where the P&G Alumnus co-signing the Application worked while at P&G. Please limit to top two or three functions.

Choices

General Advertising / Marketing Services

Brand Management

Customer Service / Consumer Relations

Distribution / Logistics

Engineering

Executive Management

Finance / Accounting

General Management

IT / MSD

Legal
Manufacturing
Market Research / CMK (Customer Market Knowledge)
Packaging
Personnel / HR (Human Resources)
Product Development
Product Supply
Public Affairs / PR (Public Relations)
Purchasing
Research & Development
Sales / CBD
Other: Technical

Geography(ies) while at P&G*

Specify the geography(ies) where the P&G Alumnus co-signing the application worked while at P&G. Please limit to top two or three geographies.

Character Limit: 5000

P&G Alum: Preferred Phone #*

Please provide the preferred phone number including country and area codes for the P&G Alum co-signing the application.

Character Limit: 250

P&G Alum: Home, Mobile or Work Phone*

For the Preferred Phone #, please indicate if this is a home, mobile / cell or work #.

Choices

Home
Mobile / Cell
Work

P&G Alum: Preferred Email Address*

For the P&G Alum co-signing the application, please provide his / her preferred email address.

Character Limit: 250

B. Organization Background

Organization's History*

Please provide a brief summary of your organization's history.

Character Limit: 2500

Current Programs, Projects and Activities*

Provide a brief description of your organization's current programs, projects and activities.

Character Limit: 3000

Evidence of Organization's Effectiveness*

Provide evidence of your organization's effectiveness. Your response can include: demonstrated track record, growth, major accomplishments, recognition / awards received, etc.

Character Limit: 3000

C. Summary of Request

Program / Project Title*

Character Limit: 250

Amount Requested (in USD)*

Amount requested in this Letter of Inquiry.

Character Limit: 20

Total Project / Program Budget (in USD)*

Character Limit: 20

Calculation: Amount Requested as a % of Total Project*

Please calculate and input the % the amount requested is of the total project / program budget. Illustration: If the amount requested is \$10,000 USD and the total project costs are estimated to be \$100,000 USD, then input 10%.

Character Limit: 250

Start Date for Program / Project*

Input as MM/YYYY your projected start date.

Character Limit: 100

End Date for Program / Project*

Input as MM/YYYY your projected start date.

Character Limit: 100

Type of Support*

Please check one that best represents your project or program.

Choices

Capacity Building

Capital Project or Equipment

General & Operating Support (excluding salaries)

Program / Project

Technical Assistance

Indicate which of the following this request supports:*

Select only one.

Choices

New Program or Project

Support of Existing Program or Project

Expansion of Existing Program or Project

None of the above.

Briefly describe the target population who will benefit from this program / project.*

Character Limit: 3000

Describe the geographic area where the program / project will be implemented.*

Character Limit: 3000

Geography Served by Program / Project*

Specify the state, province or region served by the program or project seeking funding (e.g., Mumbai, India or St. Louis, Missouri, USA).

Character Limit: 250

Country Served by Program / Project*

Specify the country served by the program or project seeking funding.

Character Limit: 250

Continent Reached*

Specify the continent where the country served is located.

Choices

Africa

Antarctica

Asia

Australia

Europe

North America

South America

D. Project / Program Summary

Provide a brief description of the program or project for which funds are being sought.*

Also address how this project supports your organization's overall mission.

Character Limit: 2500

Advancement of Your Organization's Mission*

Explain how your project / program advances the mission of your organization and how it fits with your organization's long-term strategic plan.

Character Limit: 5000

How does this program or project align with the mission of the P&G Alumni Foundation?*

Character Limit: 3000

What specific need does your program or project address? and how?*

Character Limit: 3500

Evidence of Need / Opportunity & How It Is Met*

Provide evidence, research and / or statistics to support that this need and/or opportunity exists.

Also explain how this program / project meets this need and/or opportunity.

Character Limit: 3000

Proposed Use of Funds*

Describe the proposed use of the grant funds including a general implementation plan and timeline reflecting the duration of the program / project.

Character Limit: 3500

Explain how your organization is qualified to accomplish & sustain the proposed program or project.*

Character Limit: 4500

E. Goals, Impact & Evaluation

IMPORTANT: Answers for this section must reflect the specific project / program funding being requested, not your entire organization.

What are the measurable goals & objectives this project or program hopes to achieve?*

Character Limit: 4000

Strategic Grant-Making Area*

Indicate which of the following is most representative of this grant request (select only one).

Choices

Business-related skills education & training

Entrepreneurial or business ventures
Job skills development
Vocational training

Jobs & Employment Opportunities

Estimate the # of people to be employed because of this program or project if applicable. Include both full-time and part-time opportunities (added together) that you believe to be sustainable.

Character Limit: 250

Individuals Trained

Estimate the # of individuals who will complete training for use in current or new employment because of this program or project if applicable.

Character Limit: 250

Entrepreneurial & Business Ventures

Estimate the # of new entrepreneurial or business ventures (viable in local communities) started because of this program or project if applicable.

Character Limit: 250

Family & Community Members Impacted

Estimate the # of family & community members impacted positively because of this program or project. Provide your best estimate.

Character Limit: 250

Key Performance Indicators Assumptions*

Provide your assumptions to arrive at # of jobs created, # of individuals trained, # of new businesses generated and/or the # of family & community members impacted.

Character Limit: 7500

Micro-Lending & Loans

If your program / project involves offering micro-loans or character loans, provide information on repayment rates (e.g., average repayment rate) and bad debt expense (e.g., amount & % of loans). Include your assumptions herein.

Character Limit: 5000

Advancement in Job Position & Increased Earnings*

Based on all of the KPIs provided previously, estimate the # of individuals (excluding family & community members) who will either advance in their job position and/or increase their earnings thereby contributing to greater financial independence and economic well-being. Provide assumptions herein.

Character Limit: 7500

Tracking & Monitoring Process and Tools*

Describe the process and the tools that will be used to measure, track and evaluate the impact, results and outcomes of this project / program.

Character Limit: 3500

Social Return on Investment

While this question is not mandatory, we are exploring how organizations are looking at Social Return on Investment (SROI) and other ways organizations are showcasing impact and return. According to New Economics Foundation, SROI "captures social value by translating outcomes into financial values."

Provide the following if applicable:

1. Organization's and/or program's / project's estimated SROI (explained below)
2. Any other ways your organization is showcasing impact and return to donors.
3. For both 1. & 2. above, explain your assumptions and how you've arrived at your calculations. Please also indicate if and explain how you used a PPP (Purchasing Power Parity) factor, if / as applicable.

Guidance on calculating SROI:

- How to Prove your Nonprofits' Impact with SROI
- Tell Grant Makers What Your Program is Worth: Calculating SROI

Character Limit: 10000

F. P&G Alumni Involvement

Describe how P&G Alumni have been actively and meaningfully involved with your organization.*

Address the following in your response:

- type(s) of involvement (e.g., Board or committee membership, program development or participation in program, financial supporter, etc.)
- impact and results of the Alum's involvement
- duration of service and in what capacity

Please be specific when describing & quantifying the impact and results of the P&G Alumni involvement (e.g., as Chair of the marketing committee, developed marketing plan that increased awareness by x and increased fundraising by \$100,000).

Your answer here need not be limited to the lead P&G Alumni sponsor.

List the names of all P&G Alums involved with your organization including the P&G Alum associated with this proposal.

Character Limit: 6000

of Years P&G Alum Involved with Organization*

Input the # of years the P&G Alum co-signing this proposal has been actively and meaningfully involved with your organization. Input as a whole # (e.g., 2 or 5 representing 2 years or 5 years).

Character Limit: 250

P&G Alum Tenure with Organization*

Please select the appropriate statement.

Choices

The P&G Alum co-signing the proposal has been involved with our organization for one or more years.

The P&G Alum co-signing the proposal has been involved with our organization for less than one year.

Upload a letter of support and endorsement for the project by the designated P&G Alumnus*

Building on previous answers provided in Section F, upload a letter of support & endorsement from the P&G Alum co-signing this proposal. Consider including (but not limited to) the following in your letter:

1. what compelled your involvement and support
2. how you have made a difference (*feel free to limit to a particular accomplishment or result you delivered*)
3. how your time at P&G influences your charitable involvement
4. validation of the organization's merits and your vision of the initiative's long-term potential

File Size Limit: 2 MB

G. Collaboration, Replication & Multiplier Effect

Leveraging P&G Alumni Foundation Brand Strength to Secure PR & Additional Funding*

Describe how you plan to leverage the P&G Alumni Foundation brand strength (i.e., trademark, name) to help drive awareness of and additional funding for your organization. This can include but is not limited to: press releases, requests for matching funds, etc.

If / As Applicable: For prior grant award winners, provide examples of how you leveraged the prior grant(s) and the associated results in terms of both: 1) securing additional funding and 2) generating positive publicity for your organization.

Character Limit: 7500

Collaboration with Other Organizations

If applicable, describe how your organization will collaborate with other organizations on this program / project. Include name of other organizations you are collaborating with, how you are collaborating, and results / impact of the collaboration (e.g., serve xx more individuals, seamless hand off between services, efficiency resulting in cost savings of \$xx,xxx).

Character Limit: 5000

Replicating Program / Project

If applicable, explain how your project or program is being (could be) replicated in other communities, regions, or countries.

Character Limit: 5000

New Approach to Addressing Need or Opportunity

If this project or program represents a new approach to addressing the need or opportunity described within this application, explain why you believe this approach will be more effective and/or more efficient. Provide evidence leveraging applicable research and/or best practices.

Character Limit: 5000

Expansion or Continuation of an Existing Program

If this project or program is an expansion or continuation of an existing program, provide evidence of the current project's impact, outcomes and effectiveness.

Character Limit: 5000

H. Funding Plans

Funding Plans*

Provide anticipated and secured funding by others for this current proposal by uploading a summary (in word, excel or pdf) that includes the following:

1. Name of Funder
2. Amount Requested
3. Status of Request for Funding:
 - To Be Submitted
 - Pending
 - Funded
 - Declined
4. If Funded, list amount secured & decision date

Using a table with column headers is preferred.

File Size Limit: 3 MB

Other Anticipated Funding

If / as applicable, provide other anticipated funding for this current proposal (e.g., earned income, in-kind support, special events proceeds, etc.).

Character Limit: 5000

I. Required Financial & Non-Financial Information

The Income Statement and Balance Sheet should be for the entire organization. An additional budget specific to the Program or Project seeking funding should also be submitted.

Examples of revenue statements for the organization and your project can be accessed [here](#).

Organization's Income Statement*

For the most recently completed fiscal year (need not be audited), upload your organization's income statement (can also be called statement of revenue / support and expenses).

File Size Limit: 2 MB

Organization's Balance Sheet*

For the most recently completed fiscal year (need not be audited), upload your organization's balance sheet (assets, liabilities).

File Size Limit: 2 MB

Project or Program Budget*

Upload the Project or Program Budget for the project / program seeking funds.

File Size Limit: 2 MB

Proof of Charitable Status*

If registered in the U.S. upload your organization's IRS Letter of Determination 501(c)(3). If registered outside the U.S., upload proof of charitable status.

File Size Limit: 2 MB

List of Executive & Management Staff*

Upload a list of key executive, management and staff members including: 1) names 2) titles 3) qualifications (1-2 sentences).

Use word, excel, pdf, etc. Using a table with columns identifying information above is preferred. Short bios are helpful but not required.

File Size Limit: 2 MB

List of Current Board Members*

Upload a list of your current board members including:

- name
- employer & position held at employer
- position(s) held (and currently holding) on your Board and/or with your organization

Use word, excel, pdf, etc. Using a table with columns identifying information above is preferred.

File Size Limit: 2 MB

J. Prior Grant Awards

Complete this section if you have received a prior grant award(s) from the P&G Alumni Foundation.

Prior Grant #1: Year Received

Input as YYYY referencing the calendar year grant cycle (not the date the \$s were received).

Character Limit: 250

Prior Grant #1: Amount of Grant Received (in USD)

Character Limit: 20

Prior Grant #1: Program / Project Supported

Input the project or program name used in the application.

Character Limit: 250

Prior Grant #2: Year Received

Input as YYYY referencing the calendar year grant cycle (not the date the \$s were received).

Character Limit: 250

Prior Grant #2: Amount of Grant Received (in USD)

Character Limit: 20

Prior Grant #2: Program / Project Supported

Input the project or program name used in the application.

Character Limit: 250

Prior Grant #3: Year Received

Input as YYYY referencing the calendar year grant cycle (not the date the \$s were received).

Character Limit: 250

Prior Grant #3: Amount of Grant Received (in USD)

Character Limit: 20

Prior Grant #3: Program / Project Supported

Input the project or program name used in the application.

Character Limit: 250

Answer the next two questions as follows:

- If you have received more than one (1) grant in the past, answer based on the most recent grant award.
- If you have received one (1) grant in the past, answer for that award.

Prior Grant: Impact and Outcomes

Describe the outcomes, results and impact of the project / program for which your organization previously received funding from the P&G Alumni Foundation. Comment on the following:

- actual results vs. going in assumptions
- KPIs estimated vs. realized
- impact on the financial independence of those served
- anything else you consider important related to the prior grant award and the supported program / project

The answer to this question is not meant to be a final report (*although you can pull from any final reports you have*). The question is intended to help us evaluate the impact and effectiveness of prior grants awarded.

Character Limit: 7500

Prior Grant: Leveraging P&G Alumni Foundation Brand

Describe how you actually leveraged the P&G Alumni Foundation brand strength to help drive awareness of and raise additional funding for your organization. Comment on the following and can include but is not limited to: press releases, marketing efforts (*traditional, social media*), requests for matching funds, etc.

- implemented plans and related results vs. what you planned to do and estimated results
- KPIs realized vs. estimated
- description of any non-measurable benefits realized from your efforts (*e.g., several donors reached out and expressed their excitement and enthusiasm*)
- anything else you consider important when answering this question

Character Limit: 5000

K. Charitable Status & E-Signature

U.S. or Internationally Registered Charitable Organization*

Please specify if you are:

1. a nonprofit registered in the U.S. as a 501(c)(3) charitable organization.

OR

2. an internationally registered charitable organization (i.e., registered in a country other than the U.S.).

Choices

Nonprofit registered in the U.S. as a 501(c)(3) charitable organization.

Internationally registered charitable organization (i.e., not registered in the U.S.).

When Nonprofit Established / Founded*

Input as YYYY indicating when your nonprofit was established or founded. This can be the year on the proof of charitable status.

Character Limit: 250

P&G Alum E-Signature*

By typing in the name of the P&G Alumnus associated with this proposal, you represent on his / her behalf that he / she has read this proposal, supports and endorses it, and has granted you his / her permission to co-sign this proposal on their behalf.

Character Limit: 150

Organization Acknowledgment & E-Signature

Please sign and date by typing in your signature, title and the date of submission. By doing so, you are acknowledging that you have read, understand & are complying / can comply with the guidelines, eligibility requirements and vetting procedures provided herein. Further, your e-signature represents that you have the support and endorsement of the P&G Alum associated with this grant request as noted in the prior question.

Name of Person Signing on behalf of Charitable Organization*

Character Limit: 250

Title of Person Signing on behalf of Charitable Organization*

Character Limit: 250

Date*

Character Limit: 10

Procter & Gamble and P&G are trade names of The Procter & Gamble Company and are used pursuant to an agreement with The Procter & Gamble Company. P&G Alumni Network is an independent organization apart from The Procter & Gamble Company.

THE P & G ALUMNI FOUNDATION, INC.
789372
CLIENT CODE: P&G19498

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DEPARTMENT OF THE TREASURY
INTERNAL REVENUE SERVICE CENTER
OGDEN, UT 84201-0027

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