



BROYHILL FAMILY FOUNDATION

800 Hickory Blvd SW, Lenoir, NC 28645
Fax: 828-758-8919
sheila@broyhillinvest.com

The Broyhill Family Foundation located in Lenoir, North Carolina, began in 1946, with the intent to provide opportunities for students in Caldwell County to go to college. Over the years, the foundation has grown in size and focus while retaining its interest in higher education.

Instead of providing individual scholarships, the foundation has established endowments at various colleges and universities in North Carolina. Many of our disbursements are to increase those endowments that provide scholarships and fund new programs.

Youth development programs constitute our second largest category of giving. We primarily fund programs that we have initiated or with which we have a history.

Health care research and programs at medical facilities constitute the third largest portion of our bequests. We have established funds and endowments, most of them at institutions in North Carolina.

After supporting those major areas of concentration, the foundation accepts charitable grant requests primarily from local non-profit organizations. We discourage requests from churches, public schools, and civic organizations.

We recognize that needs are great and that worthy causes abound; however, to make the most impact, the foundation must define its limitations, continue to bolster the programs we have in place, and select applicants who fit with our mission, giving preference to our Caldwell County area.



To make a grant request to the Broyhill Family Foundation **send a letter of inquiry** before making a formal submission. Consider the following criteria:

1. Grants are awarded to 501(c)(3) public charities. We consider 501(C)(3) supporting organizations with a further designation of 509 (a)(1) or 509 (a)(2). Those supporting organizations with a 509 (a)(3) designation need not apply. **A copy of the IRS tax exempt determination letter must accompany all requests.**
2. Grants are not awarded to individuals.
3. The grant should not involve liability to the Broyhill Family Foundation except to provide the amount of the grant.
4. The grant should benefit others beyond the recipient of the grant.
5. The grant should not be used for propaganda or to influence legislation.
6. The grant should be unrestrictive regarding race, creed, color, gender, sexual orientation, or national origin.
7. Broyhill Family Foundation encourages one grant per calendar year.
8. Any grant in any calendar year does not give preference to a grant from the same organization in any ensuing year. We do not underwrite ongoing expenses.
9. All grants and related information should be kept confidential. Any press releases or sharing of information should be approved by Sheila Triplett-Brady, Executive Director of the Broyhill Family Foundation.
10. The Broyhill Family Foundation does not entertain direct mail requests and its contact information should not be shared or placed on mailing lists.
11. Grants should be made for the current calendar year, not for an upcoming year.
12. We do not hold over grant requests from one calendar year to another. Our grant cycle is January through **December 1.**

We have many requests and limited staff. Therefore, we prefer that communication be electronic (sheila@broyhillinvest.com). Inquiries and applications may be emailed, faxed (828-728-8919), or a hard copy sent to our office at 800 Hickory Blvd. S.W., Lenoir, NC.



BROYHILL FAMILY
FOUNDATION

APPLICATION COVER SHEET

DATE: _____ ORGANIZATION : _____

AUTHORIZED CONTACT: _____

Title: _____

ADDRESS: _____ PHONE: _____

_____ FAX: _____

EMAIL: _____

TAX IDENTIFICATION NUMBER: _____ **(ATTACH IRS TAX EXEMPT LETTER)**

ORGANIZATION MISSION STATEMENT:

GEOGRAPHIC SERVICE AREA: _____

IN A NUTSHELL FOR WHAT/WHOM WILL THE MONIES BE USED? BE SPECIFIC SO THAT A
GLANCE AT THIS PAGE WILL SHOW EXACTLY WHAT THE DONATION IS FOR. (If a
fundraiser, for what specific purpose will the proceeds be used?)

AMOUNT REQUESTED: \$ _____



BROYHILL FAMILY FOUNDATION APPLICATION
Please allow 60 days for processing

Include the cover sheet, your IRS tax exempt letter, and the following information with your submission. We are looking for **concise but specific** information about the **charitable** return on our investment.

About the organization:

1. Description of charitable purpose
2. List of Board Members
3. Income/Expense Statement
4. Audited or Reviewed Financial Statements of the Organization (If the request is >\$5,000)
5. Annual report or year-end assessment (if applicable)

For this request:

6. Need/Problem/Issue/Objective
7. Targeted Population
8. Timeline
9. Method or Activities to Meet the Objective
10. How the Objective Supports the Mission of the Organization
11. Evaluation /Impact Measure
12. Budget for Program/Project
13. Other Sources of Funding

Letters of inquiry and grant requests can be sent to:

SHEILA TRIPLETT-BRADY
EXECUTIVE DIRECTOR
BROYHILL FAMILY FOUNDATION, INC
800 Hickory Blvd SW
LENOIR, NC 28645
FAX: 828-758-8919
EMAIL: sheila@broyhillinvest.com