SECTION I -- GUIDING INFORMATION

Grant proceeds from the Chapter House Fund shall be used to construct, renovate, furnish or equip Educational Use Areas (EUA’s) in Delta Upsilon chapter houses or facilities.

A. General Principle: Grants made by the Delta Upsilon Educational Foundation (DUEF) to undergraduate and alumni chapters in good standing, are to be used for construction, renovation, and furnishing of Educational Use Areas (EUA) in a chapter house or facility. Under U.S. Internal Revenue Service Guidelines, these grants are legal provided each of the following requirements is met:

1. Specific areas are designated in a chapter house or facility for educational purposes, (e.g. libraries, computer rooms, and study rooms).

2. The specified areas are used specifically and exclusively for these educational purposes.

3. The educational areas are segregated from the dining, social, and sleeping facilities within a chapter house.

4. The DUEF monitors the uses of grant proceeds to ensure that EUA’s continue to be used for strictly educational purposes.

B. Types of Grants

There are two types of grants: Construction/Renovation and Operating.

1. Construction/Renovation Grants

Grants from the Chapter House Fund established under a Chapter Educational Account (CEA) may be applied to the construction, remodeling, renovation, refurbishing, furnishing or equipping of an EUA.

If a new chapter house/facility is being built, purchased, or an existing structure undergoes renovation, a percentage of the total cost may be allocated to the construction and furnishing of EUAs. Guidelines for determining an allowable EUA percentage of total construction/renovation cost are included on Page 11 of this grant application.

In addition, grants may be made to furnish or equip EUAs. Such furnishings and equipment may not be used outside an EUA, and must serve educational purposes only.
2. **Operating Grants**

Chapter House Funds may also be used for grants to cover annual operating costs associated with EUAs. An operating grant may not exceed the operating costs attributable to a chapter’s EUA(s), which may be calculated as follows:

(a) **INDIRECT COSTS** -- The indirect costs are calculated by dividing the square footage of the space allocated to EUAs, by the total square footage of the chapter house or facility. Then, add the total cost of real estate taxes, casualty and liability insurance premiums, utility costs and other operating costs, which cannot be directly attributable to a specific area of the chapter house, and extraordinary system maintenance expenses.

Multiply the total operating costs by the EUA percentage, to yield the indirect costs attributable to chapter EUAs.

(b) **DIRECT COSTS** -- Additionally, operating grants may cover costs directly attributable to the EUA. These include: (1) personal property taxes assessed on furniture, fixtures, and equipment used in EUAs; and (2) any other operating costs directly attributable to EUAs.

C. **EUA Verification**

Depending on the size and scope of the project presented in this application, The DUEF may require an outside Legal Opinion letter to verify the calculation of EUA in the chapter house/facility.

D. **Additional Considerations**

According to the IRS, the key issues are whether the educational areas of a chapter house are similar in nature to the facilities provided by the college/university and whether the educational areas are truly dedicated to educational activities. This is often supported in the letter we require from the college/university representative.

Chapter Educational Account grants can only be made for purposes that meet the following requirements under IRS guidelines:
1. **Defining “Public Interest” on Campus**

On a college or university campus, “the public” is considered to be the campus community. Grant applications must address how the creation and operation of an EUA will benefit the campus community. For example:

a. The student population living in Greek housing represents a significant percentage of the student enrollment. When considering the cumulative amount of fraternity/sorority libraries and study rooms, their presence creates a reduced burden on campus facilities, and therefore provides a significant benefit to the campus community.

b. Many campus communities depend on organizations to provide educational and living facilities to supplement those offered by colleges and universities.

c. If an EUA has computer equipment connected to the college/university mainframe, the community will benefit by increasing the network of users from remote locations.

d. EUAs will conserve financial resources of colleges/universities by alleviating the need for providing additional educational facilities and resources to students.

2. **Demonstrate a Public vs. Private Interest**

As a general principle, the DUEF can only make grants for housing that serve a public rather than a private interest.

While EUAs serve educational purposes, access to a DU chapter house is generally limited to fraternity members. Therefore, the grant application must state why the private educational benefit to the chapter members through an EUA, is only incidental when compared to the public benefit derived. Determining whether private benefit is merely incidental to the public benefit created depends on the facts of each case. The controlling consideration, is whether the activities created by EUAs will cause the Public to benefit so significantly, that any direct benefit accruing to the limited class (i.e. chapter members) may be deemed incidental.
To summarize, grant applications must show that EUAs will have only incidental value to chapter members, when compared to the benefit that their creation will have on the campus community.

While the precise benefits to the campus community will vary from one institution to another, a letter from the college/university administration must be submitted to the DUEF as a part of the grant application. Such a letter should detail the benefits particular to the institution; support and recognize the educational purposes of the grant, and affirm that the educational purpose of the grant fully contributes to the educational mission of the school.

E. **Examples of Proper Use for Grant Proceeds**

Typical examples of proper use for Chapter House Fund grants are:

1. To build or renovate areas in the chapter house for exclusive use to further educational activities, including areas for personal and group study and educational seminars.

2. To construct and furnish a computer room to house various personal computers and/or the chapter’s p.c. server and peripherals. Such construction can include, without limitation, necessary climate control, electrical service and disk storage area.

3. To build a library, equipped with bookcases, shelving; file storage, tables, chairs, study carrels, lighting, books, computers/peripherals, desks and carpeting.

4. To cover annual operational costs associated with an EUA as described above.
SECTION II -- GRANT APPLICATION DATA
CHAPTER HOUSE FUND

A. **APPLICANT INFORMATION**

Legal Name of entity making application: ____________________________________________

Legal Address of entity: ____________________________________________________________

______________________________________________________________________________

Tax ID (EIN): ___________________________ Phone: (___ ) ____________

IRS code determination: ________________________________

*(please attach copy of current determination letter)*

Is applicant a corporation? _____ Incorporated in the State of: ________________________

Does the State consider the corporation to be in good standing? ____________________

Names and addresses of corporation officers:

1) ___________________________________________________________________________

2) ___________________________________________________________________________

3) ___________________________________________________________________________

4) ___________________________________________________________________________

5) ___________________________________________________________________________

6) ___________________________________________________________________________

7) ___________________________________________________________________________

8) ___________________________________________________________________________

9) ___________________________________________________________________________

10) ___________________________________________________________________________

*(Please attach separate sheet for additional officers)*
Name of officer/director authorized by corporation to apply for grant:

__________________________________________ Phone: (___)____________

(Please attach copy of written authorization from corporation)

Does the applicant own the property in which EUAs will be constructed, remodeled, refurbished, furnished, or equipped? ________________________________

(Please attach appropriate documents)

Has the applicant reviewed SECTION I of this application? ________________________

Does the applicant understand that a EUA must constitute separate facilities, which are segregated from the social, sleeping, and dining areas of the chapter house? _______________

Is it clearly understood that the applicant must monitor the use of each EUA to ensure its continuing use for specific and exclusive educational purposes? _______________

Does the applicant agree to all provisions in the Standard Building Grant Agreement?

__________________________________________________________

Has a legal Opinion Letter been obtained? ________________

(Please attach appropriate documents)

(Please attach a letter demonstrating how the presence or creation of a EUA(s) will serve a public rather than private interest, as defined above.)

B. UNDERGRADUATE CHAPTER INFORMATION

Undergraduate chapter name: ________________________________

Address: ______________________________________________________________

Phone: ________________________________________________________________

Current chapter president: ______________________________________

Address: ______________________________________________________________

Phone: ________________________________________________________________
Current chapter treasurer: __________________________________________________

Address: __________________________________________________________________

Phone: ____________________________________________________________________

Does the undergraduate chapter support this grant application? ________________

Has the undergraduate chapter reviewed SECTION I of this application? __________

Does the undergraduate chapter understand that a EUA must be used specifically and
exclusively for the educational purposes defined herein? __________________________

Does the chapter understand that a EUA must constitute separate facilities, which are
segregated from the social, sleeping, and dining areas of the chapter house? __________

UNERGRADUATE CHAPTER CERTIFICATION

I ______________________________, President of the _____________________________
Chapter of Delta Upsilon Fraternity, certify that the statements provided in the
UNDERGRADUATE CHAPTER INFORMATION section is true and accurate to the
best of my knowledge.

_________________________ __________________________
Undergraduate Chapter President Signature Date

C. COLLEGE UNIVERSITY INFORMATION

Name of institution: _______________________________________________________

President/Chancellor: _____________________________________________________

Address: __________________________________________________________________

Phone: ____________________________________________________________________

Fraternity/Sorority Advisor: ________________________________________________

Address: __________________________________________________________________

Phone: ____________________________________________________________________
Total number of full-time enrolled students: ________________________________

Total number of students affiliated with fraternities and sororities: __________

Total number of students living in Greek housing: __________________________

Total number of Greek housing units on campus: ____________________________

Is a student group or organization permitted to link personal computers to the institution’s mainframe? ________________________________________________________________

Does the institution support this grant application, as evidenced by an attached letter from appropriate personnel? ________________________________________________

D. GRANT USAGE INFORMATION

1) Grant categories

The applicant intends to use grant funds from the DUEF for the following purpose(s) [check all that apply]

_____ Create or purchase EUA(s) in new or existing chapter house construction

_____ Renovate existing chapter house to include EUA(s)

_____ Furnish or equip EUA(s)

_____ Cover operating costs for EUA(s)

_____ Other, please explain:

2) EUA location date

For each area in chapter house that will be a EUA, provide the following information: Attach section of chapter house floor plan or blueprints that identify location for each EUA.

EUA #1 Location in chapter house: ________________________________

Who will use? ________________________________________________
How space will be used?

________________________________________________________________________
________________________________________________________________________

How will it be furnished?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

How will it be equipped?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Total square footage of EUA#1: __________________________

EUA #2    Location in chapter house: ________________________

Who will use? ____________________

_______________________________________________________________________

How space will be used?  __________________________

________________________________________________________________________
________________________________________________________________________

How will it be furnished?  __________________________

________________________________________________________________________
________________________________________________________________________

How will it be equipped?  __________________________

________________________________________________________________________
________________________________________________________________________
Total square footage of EUA#2: __________________________

**EUA #3** Location in chapter house: __________________________

Who will use? __________________________

How space will be used? __________________________

How will it be furnished? __________________________

How will it be equipped? __________________________

Total square footage of EUA#3: __________________________

**EUA #4** Location in chapter house: __________________________

Who will use? __________________________

How space will be used? __________________________

How will it be furnished? __________________________
How will it be equipped? ______________________________________________________

________________________________________________________________________

________________________________________________________________________

Total square footage of EUA#4: ________________________________

Total EUA square footage in chapter house: ______________________________

Total number of students who can be accommodated in EUA(s): ________________

3) Calculation of maximum grant

NEW CONSTRUCTION/PURCHASE

If grant will be applied to the construction of a new chapter house, or purchase of an existing property, please attach copies of blueprints, floor plans, construction bids, contracts, and other supporting documentation.

a) Total square footage of chapter house ________________________________

b) Total EUA square footage ________________________________

c) Percentage of chapter house qualified as EUA
   (line b divided by line a) ________________________________

d) Total cost of construction/purchase ________________________________

e) Max. Grant for EUA construction/purchase
   (multiply line c and line d) ________________________________

RENOVATION OF EXISTING STRUCTURE

If renovating an existing structure, please submit documentation described above.

a) Total square footage of chapter house ________________________________

b) Total square footage of areas to be renovated ________________________________
c) Total EUA square footage

________________________

d) Percentage of renovation qualified as EUA
(line c divided by line b)

________________________

e) Total cost of renovation

________________________

f) Maximum grant for EUA renovation
(multiply line d and line e)

________________________

OPERATING COSTS

If seeking a grant for operating costs associated with a EUA(s), provide following data from July 1 through June 30 for the past three years. For new construction or purchase of an existing structure, provide best estimates for each category, describing rationale for each calculation.

a) Total real estate taxes

________________________

b) Total casualty and liability insurance premiums

________________________

c) Total utility costs

________________________

d) Total of additional operating costs, not directly attributable to any specific chapter house area

________________________

Breakdown of costs in line d:

____________________________________

____________________________________

____________________________________

____________________________________

____________________________________

e) Extraordinary system maintenance costs (explain)

________________________

________________________

________________________

________________________
f) Total general operating costs \((add\ lines\ a - e)\) 

________________________

g) Total square footage of chapter house 

________________________

h) Total EUA square footage 

________________________

i) Percentage of chapter house qualified as EUA 
\((divide\ line\ h\ by\ line\ g)\) 

________________________

j) Portion of operating costs assigned to EUA(s) 
\((multiply\ line\ f\ and\ line\ i)\) 

________________________

k) Total personal property taxes assessed on furniture, fixtures, and equipment to be used in EUA(s) 

________________________

l) Total building operation cost \(directly\ attributable\) EUA(s) 

________________________

m) **Maximum operating grant** 
\((add\ lines\ j, k, and l)\) 

________________________

**FURNISHING AND EQUIPMENT**

a) Total cost of EUA furnishings 

________________________

Breakdown of items and cost in line a 

________________________

________________________

________________________

________________________

________________________

________________________

b) Total cost of EUA equipment 

________________________

Breakdown of items and cost in line b 

________________________

________________________

________________________
I. Maximum grant for EUA construction/purchase $ __________

II. Maximum grant for EUA renovation $ __________

III. Maximum operating grant $ __________

IV. Maximum furnishing/equipment grant $ __________

TOTAL ITEMS I, II, III, AND IV from above $ __________

GRANT REQUEST

The applicant hereby submits this application for a grant from the Delta Upsilon Educational Foundation as follows:

Note: Grant requests cannot exceed the maximum calculated in previous section, nor exceed the total balance of a Chapter House Fund

1) NEW CONSTRUCTION/PURCHASE $ __________

2) RENOVATION $ __________

3) ANNUAL OPERATING COSTS $ __________

4) FURNISHINGS & EQUIPMENT $ __________

5) TOTAL GRANT REQUEST $ __________
CERTIFICATION

I, _________________________________, as the duly authorized officer/director/agent of the Applicant, _________________________________, do hereby certify that the information and data provided above, along with attached supporting documents, are true and correct to the best of my knowledge and belief and do hereby submit to the Delta Upsilon Educational Foundation this application for a grant to construct/purchase, renovate, refurbish, furnish or equip one or more Educational Use Areas in the chapter house of the _________________________________ Chapter of the Delta Upsilon Fraternity, located at _________________________________, as set forth in this application.

Signed this ________ day of ______________________________, _______ (year).

________________________________________
Signature

as _________________________ for the Applicant

________________________________________
Legal Name of Applicant entity
SECTION III -- APPLICATION CHECKLIST

The grant applicant must check each of the appropriate items and provide this checklist with the grant application. The applicant has:

<table>
<thead>
<tr>
<th>Undergraduate Chapter</th>
<th>Alumni Chapter</th>
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<tbody>
<tr>
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<tr>
<td>Reviewed the Guiding Information concerning EUAs included in this application</td>
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<tr>
<td>Reviewed the availability of study areas on campus and can demonstrate that EUA(s) in the chapter house will serve a public rather than private interest</td>
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<td>Attached a letter from the college or university, supporting the creation of EUA(s) described in this application</td>
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<td>Attached a copy of the minutes, formally approving the submission of this application</td>
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<td>Become familiar with the restrictions pertaining to the use of all EUAs</td>
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<td>Reviewed the Standard Grant Agreement</td>
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<tr>
<td>Furnished all applicable grant application data and information and attached all required supporting documents</td>
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SEND COMPLETED APPLICATION WITH ALL NECESSARY ATTACHMENTS TO:

Delta Upsilon Educational Foundation
8705 Founders Road
Indianapolis, IN 46268-1338