

Charitable Giving Criteria



General Criteria

Any person or organization seeking a grant or other financial support from Physician Associates of MidMichigan Community Medical Foundation (“PAMCMF”) must meet the following criteria:

- Be located within the geographic area served/represented by Physician Associates of MidMichigan, P.C., a physician organization in Mid-Michigan.
- Must be in good public and financial standing.
- Must submit a formal request online through the PAMCMF grant application web portal.
- Must provide all necessary supporting documentation electronically through the PAMCMF grant application web portal.
- Eligible, non-profit charitable organizations must provide an IRS determination letter of their 501(c)(3) status, and a current tax-exempt certificate. Organizations that do not have a 501(c)(3) status must submit an IRS Form W-9 or an equivalent document to confirm the organization’s tax identification number.
- May not be a “disqualified person” as this term is defined by applicable law and the rules and regulations of the Internal Revenue Service.

Areas Of Giving Interest

In support of our giving philosophy, PAMCMF favors proposals from organizations and individuals that:

- Are directly related to health, wellness and health education.
- Are directly related to access to clinical care and clinical technologies.
- Assist in enhancing health care services in rural and underserved areas.
- Provide support and strengthen the delivery of health care services.
- Produce high quality, cost-effective, measurable results
- Educational grants and scholarships for Health Profession Students (as hereafter defined) who intend to practice their profession following the completion of their residency, fellowship or other educational program, in the community(ies) served by the physician members of PAM. Educational grants and scholarships will be categorized as routine or extraordinary:
 - Routine grants or scholarships will be capped at a maximum of \$20,000 annually.
 - Extraordinary grants or scholarships will be those awarded in an amount exceeding \$20,000 annually and will be granted at the sole discretion of the PAMCMF Board.
- Assistance with the educational loan repayment of the Health Profession Students who practice their health professional in the community(ies) served by the physician members of PAM. Educational loan repayment assistance grants will be categorized as routine or extraordinary:
 - Routine loan repayment assistance grants will be capped at \$20,000 annually.
 - Extraordinary loan repayment assistance grants will be those awards in an amount exceeding \$20,000 annually and will be granted at the sole discretion of the PAMCMF Board.

For purposes of this document, “Health Profession Student” is defined as any student who is engaged in (or has graduated from, as applicable) an advanced education program to provide clinical care.

Exclusions and Conditions

PAMCMF does not support grant or other charitable requests from the following:

- Religious organizations, unless the program supports and is open to the community
- Political activities or candidates for public office, or any organization that participates in, or intervenes in any political campaign on behalf of or opposed to any candidate for public office
- Organizations engaged in carrying on of any propaganda or attempting to influence legislation
- Government activities
- Gaming activities
- Foreign organizations
- Organizations seeking funding for travel expenses
- Advertising or professional fund-raising
- Paid solicitors
- Individual adoption, pregnancy or abortion services
- “Disqualified persons”

PAMCMF will not provide grants to any individual or organization that, in the reasonable discretion of PAMCMF’s Board of Directors, discriminates on the basis of age, race, sex, religion, national origin, disability, family status, receipt of public assistance or sexual orientation.

Disclosure of Potential Conflicts

At the time of the application, each applicant (whether individual or an organization) for a grant or other financial support will be required to disclose any facts or circumstances that could make the applicant a “disqualified person,” as this term is defined by applicable law and the rules and regulations of the Internal Revenue Service. PAMCMF shall not provide any grants or financial assistance to any applicant, including but not limited to any educational grants, scholarship or loan repayment assistance grants to any individual, who is determined by the PAMCMF Board of Directors to be a “disqualified person.”

If any applicant for a grant or other financial support has a family or business relationship with any officer, director, committee member or any of the highest compensated employees or independent contractors of PAMCMF, but is not a “disqualified person,” then that applicant’s eligibility shall be reviewed and determined on its own merits and without any preference to that applicant’s family or business relationship.

All grant requests will also be examined under PAMCMF’s Conflict of Interest Policy and Healthcare Regulatory Compliance Policy.

If PAMCMF determines at any time after awarding any grant, that the grantee was a “disqualified person,” that the grantee becomes a “disqualified person” during the term of the grant, or that the grantee did not qualify or no longer qualifies for a grant under the PAMCMF’s Conflict of Interest Policy and/or Healthcare Regulatory Compliance Policy, then PAMCMF shall have the right to require the return of the awarded funds (and, if so required by PAMCMF, the grantee must immediately return the awarded funds), and may take other reasonable and appropriate steps to the extent allowed by applicable law.

Grant Proposals and Award Letters

Each grant proposal and award letter will:

1. Specify PAMCMF's responsibilities and those of the grantee,
2. Obligate the grantee to use the grant funds only for the purposes for which the grant was made,
3. Provide for interim written reports concerning the use of grant funds,
4. Require a final written report and an accounting of how grant funds were used, and
5. Acknowledge PAMCMF's authority to withhold and/or recover grant funds in case such funds are, or appear to be, misused.

Frequency and Amount Of Support

Typically, only one charitable gift or sponsorship will be awarded to any organization or individual per calendar year. If renewed funding is desired, the organization or individual must submit a new request each year. Unfortunately, it is not possible for PAMCMF to fund every opportunity presented. Submission of an application does not guarantee that a proposal will be approved, or that it will be funded at the level requested.

Managing and Use of Grant Funds

PAMCMF's award letter will specify the terms of the grant, including the use of grant funds, reporting schedule, and the need to adhere to any specific grantmaking policies. Grant funds should be managed prudently, and must only be used for the purposes, over the timeframe, and in the manner set forth in the award letter for the approved grant proposal. Awarded grant funds may not be expended on any costs incurred prior to the grant start date or, without PAMCMF's prior written approval, after the grant end date.

Grant funds cannot be used as collateral, to offset other financial obligations (including interest payments on lines of credit, and securing or servicing debt, with the exception of educational loan repayment assistance grants which are intended and can only be used to assist the grantee with the repayment of the grantee's educational loan(s)), nor to meet cash-flow or general operating expenses that are unrelated to the purpose of the grant proposal as defined in the grant award letter.

Reporting and Record Keeping

1. By PAMCMF

PAMCMF will keep records relating to all grants it makes, including (a) information obtained to evaluate potential grantees, (b) identification of grantees, including any family or business relationships that could make the grantee a "disqualified person," (c) amount and purpose of each grant, (d) manner of selection of the grantee, and (e) follow-up information, including required interim and final reports and investigation of jeopardized grants.

2. By Grantee

PAMCMF requires timely and informative interim and final grant reporting concerning the use of the grant funds. Narrative and financial reports must be submitted together on or before the due dates specified in the award letter, to allow PAMCMF to determine whether the grantee has performed the activities the grant was intended to finance and if and how much of the funds have been used. If unusual circumstances arise that may occasion delays in the reporting, grantees must promptly inform PAMCMF staff. PAMCMF will consider the grantee's reporting and use of the funds history in the awarding of future grants.

Grantees are required to retain accounting records, detailing all receipts and expenditures, for a minimum of three (3) years following submission of the final grant report. PAMCMF reserves the right to conduct audits of records related to the use of grant funds.

Grant Modifications

PAMCMF recognizes that project or individual circumstances may change over the life of a grant, suggesting a need to modify a grant timeframe or other terms. When this occurs, a grantee is required to notify PAMCMF in writing, within three (3) months of identification of a need for a change in grant status, with a detailed description of the proposed modification, setting forth the reasons that funds cannot be spent as originally proposed and the planned activities for the remainder of the grant, and seek an advance written approval to modify the grant terms. PAMCMF is not required to agree to any change requests, and may request additional information and documents prior to making its decision.

Certain Adverse Consequences

Without limiting PAMCMF's rights or remedies, PAMCMF has the right to and will investigate the use of the funds, and may suspend grant activities and require the return of grant funds, and if so required by PAMCMF the grantee must immediately return the awarded funds, in the following circumstances:

1. Delinquent or unsatisfactory reporting by the grantee;
2. The grant funds are or appear to have been misused or used inconsistently with the grant award;
3. If the circumstances change and a written request for a grant modification is not received by PAMCMF within three (3) months after grantee's identification of a need for a change in grant status, or is timely received but not approved, then the award amount must be returned in full to PAMCMF.

In any of the above circumstances, PAMCMF reserves the right to take any and all reasonable and appropriate steps to recover the grant funds, and, where applicable, ensure that other grant funds held by a grantee are used for their intended purposes, and withhold further payments to the grantee until it obtains the grantee's assurances that future diversions will not occur and that the grantee will take extraordinary precautions to prevent future diversions from occurring.

This Charitable Giving Criteria was adopted by the Board of Directors at a meeting held on April 22, 2021, to have immediate effect. A copy will be given to each member of the Board of Directors, officer and committee member, and it will be maintained in the PAMCMF's records.