

# Partners for Better Futures

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Ref.: EID 82-2274818, June 29, 2018, Information Request - Letter 1312

July 16, 2018

Ms. Angela Parker  
Exempt Organization Specialist  
ATTN: Angela Parker, ID# 20334  
BLN:2-F17-154  
Group: 7823  
Internal Revenue Service  
Exempt Organizations  
2970 Market Street  
Philadelphia PA 19104

Dear Ms. Parker:

Following this cover letter is the first three (3) pages of your correspondence of June 29, 2018. Page 3 includes my signature, under the declaration statement.

Partners for Better Futures' (PBF) responses to the three (3) categories of "information requested" are organized and presented as follows, with the page numbers handwritten in the lower, right hand corner of each page.

| <u>Item Description</u>              | <u>Pages</u> |
|--------------------------------------|--------------|
| 1. #1.a.-b.                          | 1-4          |
| 2. # 2.a.-d.                         | 5-6          |
| 3. #3.a.-h.                          | 7-9          |
| 4. SAMPLE Request for Proposal (RFP) | 10-12        |
| 5. SAMPLE Grant Agreement            | 13-15        |

It would be appreciated, if you would acknowledge that this correspondence and the attached material have successfully reached you.

Thank you.



Andrew Lederer





Department of the Treasury  
Internal Revenue Service  
Tax Exempt and Government Entities  
PO Box 2508  
Cincinnati, OH 45201

PARTNERS FOR BETTER FUTURES  
% ANDREW LEDERER  
1275 FAIRWAY DRIVE  
LOS ALTOS CA 94024

**Date:**

June 29, 2018

**Employer ID number:**

82-2274818

**Person to contact / ID number:**

Angela Parker

ID# 200334

**Contact telephone number:**

267-466-2138

**Contact fax number:**

888-524-5402

**Response due date:**

July 27, 2018

Dear Applicant:

**Why you are receiving this letter**

We need more information to consider your determination letter request.

**What you must do**

Please provide the information requested and follow the submission instructions. You must submit your response by the due date above.

**If you don't respond**

If you don't respond to the Information Request by the due date, or don't provide all the requested information, we may close your case without making a determination. If so, we won't refund any user fee you paid, and you'll need to submit a new request and any applicable user fee payment if you want us to reconsider your request. Alternatively, if you haven't established that you meet the requirements for exemption for the subsection requested, we may make an adverse determination.

In addition, if you don't provide the requested information by the due date, you may lose your rights to get a declaratory judgment. Under Internal Revenue Code (IRC) Section 7428(b)(2), you must exhaust all administrative remedies available to you within the IRS before a court will issue a declaratory judgment about your exempt status. This requirement means you must take all reasonable steps in a timely manner to secure a determination under IRS procedures, including providing the information we need to act on your request. If you fail to timely provide the requested information, you may lose your rights to obtain a declaratory judgment under Section 7428.

**Additional information**

If you have questions or need additional time to respond, call me at the number at the top of this letter. If you have concerns after speaking with me, you can call my supervisor Jeffrey C Gaunce at (513) 975-6277.

**Letter 1312 (Rev. 4-2017)**

Catalog Number 35163W



Partners For Better Futures  
82-2274818

The Taxpayer Advocate Service (TAS) is an independent organization within the IRS that can help protect your taxpayer rights. TAS can offer you help if your tax problem is causing a hardship or you've tried but haven't been able to resolve your problem with the IRS. If you qualify for TAS assistance, which is always free, TAS will do everything possible to help you. Visit [taxpayeradvocate.irs.gov](http://taxpayeradvocate.irs.gov) or call 1-877-777-4778.

Sincerely,



Angela Parker  
Exempt Organizations Specialist

Enclosure:  
Information Request



**Information Request  
First Request**

**Information we need to make our determination**

Include the following declaration with your response, signed and dated by an officer, director, trustee, or other governing body member (not an authorized representative). You can sign and date the statement below or reproduce it in the body of your signed response. The declaration must accompany responses per Revenue Procedure 2018-5.

*Under penalties of perjury, I declare that I have examined this information, including accompanying documents, and, to the best of my knowledge and belief, the information contains all the relevant facts relating to the request for the information, and such facts are true, correct, and complete.*

Andrew Lebler  
SIGN HERE CHIEF EXECUTIVE OFFICER

July 16, 2018  
Date

1. Your application indicates that you operate (or will operate) in a foreign country, but did not clearly describe the activity. Please provide the following:

- a. Identify the specific countries (and regions within the countries) in which you operate.
- b. Describe your operations in each country.

2. Please answer the following in regard to Office of Foreign Assets Control (OFAC) compliance:

- a. When you conduct activities in foreign countries, will you check the OFAC List of Specially Designated Nationals and Blocked Persons for names of individuals and entities with whom you are dealing to determine if they are included on the list?
- b. What other practices will you engage in to ensure that foreign expenditures or grants are not diverted to support terrorism or other non-charitable activities?
- c. Will you comply with all United States statutes, executive orders, and regulations that restrict or prohibit U.S. persons from engaging in transactions and dealings with designated countries, entities, or individuals, or otherwise engaging in activities in violation of economic sanctions administered by OFAC?
- d. Will you acquire from OFAC the appropriate license and registration where necessary?

3. Please answer the following about grants you will make to organizations or individuals located in foreign countries:

- a. State the organizations to which you do (or will) distribute funds or goods, and if they have been recognized as tax-exempt by the IRS, state their exempt status.
- b. List any distributions (in funds or goods) you made to date, including the recipient, what and how much was disbursed, and how the distribution furthered your exempt purposes.



## Item #1.a.-b. Responses to Information Request Dated June 29, 2018

1. Your application indicates that you operate (or will operate) in a foreign country, but did not clearly describe the activity. Please provide the following:

1.a. Identify the specific countries (and regions within the countries) in which you operate.

**RESPONSE:** PBF currently envisions operating in the following three countries:

1. Myanmar (also known as Burma) – with projects throughout the country, except in potential conflict areas.
2. India – with most projects likely to be in the state of Maharashtra.
3. Philippines – with projects in the Province of Bukidnon, Island of Mindanao.

1.b. Describe your operations in each country.

**RESPONSE:**

### Myanmar

PBF will organize and finance construction of school buildings and renovation of existing school buildings by making grants designated for those purposes to local NGOs and community organizations. PBF's objective will be to construct school facilities and support schools that are excellent learning environments for children who otherwise would not readily have access to a school.

PBF will first develop relationships with local NGO's and groups, seeking to work with groups that have excellent reputations and that are active in helping underserved communities improve their living conditions with education, health services, livelihood training, family planning and support, and other charitable activities. PBF will obtain references, and will meet with leaders of groups before selecting groups with which to make grants.

PBF will ask prospective grant recipients to identify communities which need school buildings – new, expanded, or/or renovated. PBF's criteria will include: (1) school building is very much needed; (2) efforts have been made to get government or other support; (3) the community is committed and able to operate and maintain the school; (4) the prospective grantee and community agree to not discriminate by gender, ethnicity, or religion (5) PBF is able to raise the funds needed.

PBF will ask prospective grant recipients to prepare a proposal and a budget for construction projects that meets PBF criteria. PBF will evaluate proposals and will communicate to resolve questions and issues.

If a proposal meets PBF's criteria and PBF has the necessary funds and decides to go forward, PBF will prepare a "Grant Agreement" and have it signed by all parties.

PBF will monitor progress throughout the construction and program implantation processes and regularly thereafter. PBF will expect construction to begin within a timely period, after a Grant Agreement is signed. PBF's representative in Burma will generally visit the project site during construction and following completion, documenting each step by taking photos and obtaining receipts and other records.



## Item #1.a.-b. Responses to Information Request Dated June 29, 2018

PBF will obtain and review records of the expenditures on each project to determine that the funds are used in accord with the Agreement between PBF and the grant recipient. Any unused funds will be returned to PBF on a timely basis.

PBF will monitor grantee schools, generally documenting conditions annually, to ensure that buildings are being used as agreed upon between PBF and the grant recipient.

In addition to visits by PBF Board members every year, PBF anticipates hiring a full-time "Country Director" to assist with:

- Identifying potential projects;
- Assessing project needs;
- Establishing and managing relationships with local NGOs and communities;
- Assisting in the completion of Requests for Proposals (RFPs);
- Reviewing proposed plans, schedules and budgets;
- Overseeing construction of approved projects;
- Determining when funds should be transferred to NGO partners with whom PBF has a Grant Agreement;
- Assuring that funds are used per budget and Grant Agreement;
- Documenting progress;
- Confirming a project's satisfactory completion.

### India

PBF will provide grants to schools in India to develop or expand their facilities and programs. PBF's process for project evaluation, review, approval and funding will be the same, as what is described above for Myanmar.

One potential project is with Mata Balak Utkarsha Pratishthan (MBUP), in Sangola, Maharashtra. This well-established school serves approximately 800 students. The school admits students without regard of ability to pay fees. Approximately 40% of the students pay no fees and are fully subsidized for their required school expenses (supplies, equipment, uniforms, meals, etc.).

The project will be to provide the facilities and equipment for a new, government approved, vocational training curriculum for the existing MBUP high school. Building these new facilities will make a difference by helping children successfully complete their education in high school – especially, if the student is unlikely to continue their education at college.

MBUP has a 30+ year, solid track record of advancing education for rural students in a 20 mile radius of the school. Parents and individuals in the community are active participants in the process, expressing their thoughts about the education provided to their children.

By responding to the community's needs and gaining their support, the school has grown by adding one grade level per year – starting from a pre-Kindergarten class and completing their high in 2017. Funding for construction of the school has come primarily from local sources within India and to a limited extent from the U.S.

Nearly 90% of MBUP's students' parents are farmers who depend on each year's rainfall and the resulting crops. Regular occurrences of drought have increased, and profitable harvesting is



## Item #1.a.-b. Responses to Information Request Dated June 29, 2018

becoming more difficult. Providing children a quality education allows a greater potential for income and success in their lives.

The MBUP school has a board of directors responsible for its operational and financial well-being, and a strong management team with whom PBF will work to finalize an agreement.

In addition to visits by PBF Board members each year or two, PBF anticipates hiring a part-time "Country Director" to assist with the tasks similar to those described above for Myanmar.

### Philippines

In the Philippines, PBF expects to provide grants for school buildings and operations for the Apu Palamguwan Cultural Education Center (APC). PBF's process for project evaluation, review, approval and funding will be the same as what is described above for Myanmar and India.

The project will be to support the school's operations and meet the current need to build two more corresponding school facilities for Kindergarten through third grade to replace temporary facilities. There is also a need to add facilities for the completion of the high school, with the addition of grades eleven and twelve over the next two years.

The APC school has a board of directors responsible for its operational and financial well-being, and a strong management team with whom PBF will work to finalize an agreement. The school also involves the local communities in the school operations, and many of the teachers hired have graduated from APC school. The local tribal leader is the principal of the school, and he is responsible for discipline at the school.

The APC school has been in operation for over 20 years, providing primary, and more recently, high school education for children in the village of Bendum and its surrounding villages in the mountains of Mindanao. Funding for the school has come from sources within and outside the Philippines.

The education program starts in Pulangien, the native language of the local people, and addresses the values of their ancestral culture. As the children progress from Kindergarten through 12<sup>th</sup> grade, the curriculum includes the languages of their region, Visayan; the country language, Filipino; and the international language, English.

There are currently about 400 children being educated in the APC school. The first years of Kindergarten through third grade are provided in corresponding schools in four local villages, so that the younger children may continue to live at home during their early education. For grades four through twelve, many students reside at Bendum, the main campus, since the walk from their surrounding villages would take more than a day. These students are provided room and board at the school.

In addition to the standard, accredited school subjects, the curriculum includes skills and knowledge that prepare students to become leaders in their own communities, caring for the forests that they rely on and for the agriculture that sustains them. Some of the students also learn practical skills like carpentry, masonry, maintenance of the water resources, hydro-electric systems, solar-electric systems, and other skills necessary for the welfare of the community. The students are being prepared to determine their own futures and the path forward for their own communities, as they gradually interact with the world beyond their village perimeters.



**Item #1.a.-b. Responses to Information Request Dated June 29, 2018**

The APC budget is 100% for ongoing support child education and adult education to the extent that some of the high school students or students in practical skills programs are in their 20's. The school also provides room and board for many students and basic medical care as needed.

In addition to visits by PBF Board members to the APC school, PBF anticipates communicating monthly and meeting annually with Fr. Pedro Walpole, in the Philippines or during his visits to the U.S. Fr. Pedro is a Jesuit priest, who is the Executive Director of APC and has been instrumental in the success of the school for over 25 years.



Item #2.a-d. Responses to Information Request Dated June 29, 2018

2. Please answer the following in regard to Office of Foreign Assets Control (OFAC) compliance:

2.a. When you conduct activities in foreign countries, will you check the Office of Foreign Assets Control (OFAC) List of Specially Designated Nationals and Blocked Person for names of individuals and entities with whom you are dealing to determine if they are included on the list?

**RESPONSE:** Yes. Checking the OFAC List will be a mandatory step in PBF's procedure for vetting every potential, partner organization to verify the organization, entity or any individuals involved, are not on the OFAC list.

2.b. What other practices will you engage in to ensure that foreign expenditures or grants are not diverted to support terrorism and other non-charitable activities?

**RESPONSE:** PBF will do extensive investigations, reference checking and vetting of every potential Grant recipient organization. This will be done utilizing known organizations and individuals, in addition to utilizing in-country references and in-country persons fully responsible to PBF.

Information will be collected and documented starting with a Request for Proposal (RFP) from the Grant recipient.

See sample RFP attached.

After a project, and the partner organization, has been thoroughly investigated, PBF will develop a comprehensive Grant Agreement to be signed by PBF and by the Grant recipient organization.

See sample Grant Agreement attached.

When the project has commenced, PBF and its representatives from the U.S. and in-country will continue to monitor and document that funds are being appropriately applied per the agreed upon budget. Any funds not utilized for the project will be returned to PBF.

For one-time projects (e.g. construction of a school building), a final accounting will be required within a pre-agreed number of months following completion. Receipts will be obtained for all major expenditures and for minor expenses, when feasible. For ongoing projects (e.g., support of a school's operations) an annual financial statement will be obtained, signed by the appropriate officers or the responsible project leader(s).

Finally, PBF intends to conduct ongoing monitoring of each project, as feasible, from year-to-year.

2.c. Will you comply with all United States statutes, executive order and regulation that restrict or prohibit U.S. persons from engaging in transactions and dealing with designated countries, entities, or individuals, or otherwise engaging in activities in violation of economic sanctions administered by OFAC.

**RESPONSE:** PBF will always make diligent efforts to be aware of all U.S. statutes, executive orders, regulations and rules designated by OFAC and described in Item 2.c., and PBF will always fully comply such matters.



Item #2.a-d. Responses to Information Request Dated June 29, 2018

PBF fully understand the importance of monitoring projects to assure compliance with all U.S. laws and regulations. Performance monitoring will also be an important activity for PBF to assure its donors that their contributions have been used for the designated purpose and in a fully legal manner, as required for the U.S. and for the project's specific location.

2.d. Will you acquire from OFAC the appropriate license and registration where necessary?

**RESPONSE:** PBF will only proceed with a project, when all required U.S. and local licenses and registrations have been obtained.



Item #3.a-h. Responses to Information Request Dated June 29, 2018

3. Please answer the following about grants you will make to organizations of individuals located in foreign countries:

3.a. State the organization to which you do (or will) distribute funds or goods, and if they have been recognized as tax-exempt by the IRS, state their exempt status.

**RESPONSE:** PBF does not anticipate developing projects in the U.S., therefore, none of the organizations that PBF might support would have or need IRS or state exempt status. Should PBF, at some future time pursue a project in the U.S., the tax-exempt status would be determined, prior to proceeding.

3.b. List any distributions (in funds or goods) you made to date, including the recipient, what and how much was disbursed, and how the distribution furthered your exempt purpose.

**RESPONSE:** PBF has made no distributions of any kind to date.

3.c. Describe your process for reviewing and approving requests for funds or goods, including the pre-grant inquiries you conduct on potential grantees, and how you determine grant amounts.

**RESPONSE:** PBF will pursue projects and partnerships with local NGOs in our target, geographic areas, with organizations that may provide education, health, safety, livelihood training, and other charitable activities. PBF will evaluate each NGO's suitability for proposing, managing and possibly receiving grants. PBF will research and consider needs, leadership, charitable activities, reputation in their community, and reputation with other local NGOs. The potential for active involvement and support from the local community and possible funding from other charitable organizations will also be investigated.

If PBF's initial assessment appears to be promising, PBF will invite grant requests from the selected NGO. PBF will provide the NGO a form, or format, as a "Request for Proposal" (RFP), that describes the criteria that PBF will use to decide whether or not to make a grant.

Information that will required in the RFP (See Sample RFP attached) includes:

- Community description, including demographics and economic factors;
- Needs statement;
- Description and background of the local NGO, which could be a religious organization, a local school committee, or village leaders that would assist in managing the project and involving the local community;
- Statement of non-discrimination with regards to ethnicity, gender, religion or economic status;
- Construction plan (if applicable);
- Estimated budget including labor, professional fees, materials, supplies, equipment, transportation, etc.;
- Approximation of funding required;
- Potential sources of funding, beside PBF's support;
- How the local community will contribute to the project's development and sustainability, which could be unskilled labor for construction projects, and community leadership;
- Sustainability of the project, after development;
- Readiness of the community for the project to commence.



### Item #3.a-h. Responses to Information Request Dated June 29, 2018

PBF evaluates each Grant Proposal to determine whether it meets BSB's criteria. If more information is needed, PBF will follow up to obtain it. PBF will evaluate all aspects of the Grant Proposal. PBF will closely examine the budget for reasonableness, comparability to similar projects, and assess whether all necessary items and conditions are included and acceptable to PBF.

For construction projects such as school buildings, PBF will accumulate comparable cost information for buildings of various sizes in the region. This will assist PBF in determining the appropriateness of the budget for a particular building size and type of construction. For operational support projects, such as operating a school, PBF will obtain comparable cost information for schools in the region. Other factors such as per student attendance costs, and expenses for supplies, equipment, maintenance and, most importantly the number of teacher and their salaries will be reviewed in comparison to other local schools.

One or more representative(s) of PBF will meet and communicate with leaders of the NGO and members of the target community, several times, before deciding to make a grant. The process is to be designed to assure the RFP, Grant Proposal and Grant Agreement are complete, accurate and achievable within a designated time frame.

**3.d.** If you enter into a written grant agreement with grantees, submit representative copies of the grant agreements.

**RESPONSE:** PBF will always enter into a written grant agreement with grantees. See attached Grant Agreement.

**3.e.** If a grant recipient is eligible for repeated grants, explain whether they must reapply and continue to provide information regarding how funds or goods are used.

**RESPONSE:** Grants for on-going partner projects will be reviewed annually. Only after a review that assures the grantee organization is continuing the original purposes of the grant will approval be given for distribution of additional funds. In an on-going partner wishes to propose a new service or area of charitable work a Request for Proposal will be required. For any major capital projects, such as a new building, a full budget and construction plan will need to be provided for review and approval.

**3.f.** Explain whether you accept donations earmarked for particular organizations or individuals.

**RESPONSE:** PBF will not accept donations earmarked for any individuals, nor will PBF make grants to any individuals.

PBF may identify a project, which ultimately accepts donations earmarked for that particular project. For example, a donor may request to fund the cost of building an entire school, and PBF would honor such a request for a PBF identified and approved project. A donor may also request, and PBF would likely approve, that a donation be utilized to support the operations of a particular, PBF partner school for which PBF has an on-going relationship. The final decisions about the transfer of funds, and all aspects of the project review and approval will always remain the sole responsibility and authority of PBF.



**Item #3.a-h. Responses to Information Request Dated June 29, 2018**

**3.g.** Specify how you will exercise control and responsibility over the use of any funds or goods granted to foreign organizations or individuals to ensure they are used properly (e.g., requiring grantees to submit periodic reports, or accountings, engaging accountants to audit grantees, sending representatives for field investigations, etc.).

**RESPONSE:** PBF will make site visits pre-grant, during the period of the grant, and after completion of the grant. This will be performed by PBF's country representative, and for most grants, by a member of PBF's Board of Directors. Supporting documentation will include photographs, written information copies of documents. All project information will be gathered and retained in an online repository.

When a project has commenced, PBF and its representatives from the U.S. and in-country will continue to monitor and document that funds are being appropriately applied per the agreed upon budget. The documentation will include reports, receipts and photo documentation.

A review will be done, after the grant project is completed or is fully operational. Final results will be compared to the Grant Proposal and the Grant Agreement. This will include an assessment of the performance of the purpose of the grant, the performance of the grantee, and the grantee's compliance with terms of the grant.

For one-time projects (e.g. construction of a school building), a final accounting will be required within a pre-agreed number of months following completion. Receipts will be obtained for all major expenditures and for minor expenses, when feasible.

For ongoing projects (e.g., support of a school's operations) an annual financial statement will be obtained, signed by the appropriate officers or the responsible project leader(s). As applicable, the budget and construction plans, or a school's annual final statements, will be reviewed, which may include officially conducted audits by local authorities.

As specified in the Grant Agreement, any funds not utilized for a project will be returned to PBF.

PBF also intends to conduct ongoing, year-to-year monitoring of each completed project. This will be done through a variety of methods, including site visits; written reporting; photo documentation; and verbal contacts.

**3.h.** Specify to what extent, if any, you share board member or other key personnel with recipient organizations.

**RESPONSE:** PBF will share no board members or any personnel with recipient organizations.



~~~SAMPLE~~~

## PARTNERS FOR BETTER FUTURES REQUEST FOR PROPOSAL (RFP)

### MYANMAR SCHOOL CONTRUCTION PROJECT

#### Introduction and Background

Working with local partners, Partners for Better Futures (PBF) helps construct and develop new schools, as well as expand or replace outmoded schools in communities throughout Myanmar. PBF looks to assist poor communities in need of school facilities, where government or other assistance is not available.

PBF seeks Myanmar NGO partners with demonstrated abilities and experience working in poor communities to assist PBF in organizing and overseeing the project. PBF also pursues motivated and well-organized communities, where local residents will be actively involved with developing the project and participating in the ongoing operations of the school.

#### Types of Schools

Primary schools, middle schools and secondary (high) schools are PBF's highest priorities. Preschool facilities are eligible but are lower priority. Typical projects are expected to cost from 15,000,000 – 35,000,000 Myanmar Kyats (U.S. \$11,000 – \$26,000). Schools can be government, religious or community-supported.

#### Selection Criteria

##### Need

PBF seeks to assist poor communities that have no school or are in need of improved or expanded school facilities. PBF's mission is to improve access to education for children who do not have it, or have limited access to education.

##### Community Participation

Well-organized communities, with a plan for school development, and a willingness to contribute (land, labor, materials, money) to the construction of their school will receive highest priority. A community should have a school committee and, ideally, a Myanmar NGO partner. Communities are expected to seek government approval for the school and recognition of the school by the Ministry of Education/Township Education Officer or the Department of Religious Affairs (monastic schools).

##### Sustainability

PBF prefers to help build school facilities where communities and/or NGOs have a source or sources of operating costs, including teacher salaries. This could include the provision of



## Attachment "RFP" for Responses to Information Request Dated June 29, 2018

government teachers or the payment of costs by school fees by charitable or religious organizations.

### Readiness

Projects organized, with government approvals, and ready to proceed by mid 201x will be preferred.

### Inter-ethnic and Inter-religious Cooperation

PBF seeks to help all children in need of education regardless of ethnicity, gender or religion. School projects including multiple cooperating ethnic and religious groups will receive highest funding priority.

### Keeping Families Together

PBF believes that children learn best and will have the greatest life success, when they remain with their families. PBF, therefore, favors community schools, where children can live with their parents while learning. Schools that require children to live away from their families are not likely to receive PBF's consideration for assistance.

### **How to Respond**

PBF expects to be able to support several school projects for 201x. PBF seeks information to allow us to select the most promising projects and local partners. If your organization has a school project it would like PBF to support, please submit a brief proposal including the following:

#### Community Description

Include information about the location, size, income status, ethnicity and other relevant information about the community. Please describe any cooperation among ethnic and religious groups to accomplish the school project (½ page).

#### Needs Statement

Describe why the community needs new, expanded or renovated school facilities (½ page). Please also attach any photos showing any existing school and community conditions.

#### Cooperative Financing

Please describe the amount, source and timing of any other sources of funding (including government assistance, other NGO contributions or local, community funds).

#### Construction Plan

Describe how the school will be built, by whom, and how materials and expertise will be obtained. Describe how land will be titled to ensure that operation of the school will be protected (½ page).



## Attachment "RFP" for Responses to Information Request Dated June 29, 2018

### Elevation, Site and Floor Plans

Provide drawings, if available (1 page; 2 drawings).

### Construction Budget

Provide a budget, identifying all land, material, labor, transportation and management costs. Be sure to include toilets and water facilities, and show which items will be contributed by the community (1 page).

### Sponsoring Local Partner

The local partner organization can be a Myanmar NGO, a monastery, a church or other religious organization and/or a local school committee. Describe the local partner organizations and any contributions it will make to the project (½ page).

### Community Participation and Organization

PBF strongly prefers projects with active community participation. Participation can take the form of contributed land or funds, donated labor, donated materials, or donated improvements related to the school (e.g. toilets, fencing, well digging, water or electrical utilities). Describe proposed community participation and organization. Name the members of the school committee and other key individuals and identify their roles (½ page).

### Sustainability

PBF primarily helps communities build needed school facilities. We expect communities to demonstrate that teachers and other operating costs will be paid. A government or other funding commitment to cover operating costs is preferred. Describe how school operating costs will be paid, including how any fees paid by parents are determined and the amount of student fees anticipated (annual total or average per student) (½ page).

### Readiness

Describe when and how the NGO partner and community will be ready to start the project. If a likely contractor has been identified, provide the name and phone number of the contractor.

### **Submitting proposals**

Provide a dated cover letter with any additional pertinent information that you would like PBF to know or questions that you have. Include the names, roles and contact information of the key individuals involved with responsibility for the RFP submission and the project.

The RFP and cover letter should be emailed to:

[ Name ], Executive Director, Partners for Better Futures, [ [USANAME@pbf.org](mailto:USANAME@pbf.org) ]

and

[ Name ], Country Director, Partners for Better Futures [ [MYANMARNAME@pbf.org](mailto:MYANMARNAME@pbf.org) ].



*Note for IRS: This sample Grant Agreement demonstrates wording that will be used with Grantees that receive and disburse project funds. The Grantee will be a local NGO or a government entity. The names of the organizations included in the examples are fictitious.*

~~~SAMPLE~~~  
**PARTNERS FOR BETTER FUTURES  
GRANT AGREEMENT**

This is an agreement between Grantee (Name of Grantee Organization) and Partners for Better Futures (PBF) concerning a specific project collectively referred to as "the Project" in this document. Specific, descriptive information concerning the Project is contained in a "Request for Proposal," (see Attachment "Request for Proposal"), which is included, as an addendum to this Grant Agreement. "Parties" in this document refers collectively to Grantee and PBF.

With agreed upon financial support from PBF, the Parties declare their intent to cooperate to achieve the Project goal to:

(Example 1) Construct a new building for an elementary school with four classrooms located in Kar Shi Lu Village, Irrawaddy District, Myanmar, with construction to begin in 201x, and to be completed within 12 months of funding.

(Example 2) Provide support for operating the Shivaji High School, located in Beed, State of Maharashtra, India, for one year beginning June 1, 201x.

(Example 3) Develop and support the implementation of an expanded curriculum for environmental studies at the Doctor Jose Rizal High School, located in Agutay, Province of Palawan, Philippines for one year beginning January 1 201x.

The Parties agree that the Budget dated \_\_\_\_\_ is our best estimate of the costs to complete the Project. The Budget may be revised subject to agreement by all Parties.

**The Grantee will:**

1. Prepare and overall plan for the Project with assistance and guidance of PBF's representative(s).
2. Obtain all necessary approvals and documents from government departments and agencies that authorize the Grantee organization to legally develop and operate the Project. This may include building permits, operating permits, land usage authorizations, ownership documents, licenses, accreditation, staff credentials, acceptance of foreign currency and any other local, legal requirements.
3. Disburse, monitor and document funds for the Project. Grantee will assure that funds provided by PBF will only be used for the Project.
4. Notify PBF within 60 days of awareness of problems that arise that risk not achieving the Project goals.



**Attachment "Grant Agreement" for Responses to Information Request Dated June 29, 2018**

5. Return to PBF any funds in excess of actual costs, agreed upon management fees and expenses, as specified in the Budget, within 90 days of Project end date, or if Project is for construction, within 90 days of completion of construction.
6. Grantee will return to PBF any unspent funds if the Project is not commenced within 180 days of receipt of funds, or within 180 days (from the date halted) if the Project is halted and if Grantee does not expect to restart Project.
7. Acknowledges PBF's authority to withhold and/or recover funds in such cases as funds are or appear to have been misused.
8. Provide photographs, and/or permit photographs to be taken by PBF representatives, of stages of the project, including planning, construction, opening, and operation.
9. Use its best efforts to secure support from the appropriate governmental agencies that are needed to achieve the goals of the Project, which for schools may include teacher salaries, equipment, supplies, texts and teaching aids.
10. Ensure that benefits of the Project are provided to people regardless of their religion, ethnicity, gender or economic status.
11. Monitor the Project to ensure no violations of laws or regulations are committed that are not permitted under U.S. laws and regulations for nonprofit charitable organizations. This includes refraining from making or accepting bribes, or committing or permitting corrupt practices.
12. Ensure that no funds are transmitted, used, or benefit in any way individuals or organizations sanctioned by the U.S., or that are prohibited by U.S. laws and/or regulations.

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**ADDITIONAL TERMS for grant agreements supporting operations or non-physical enhancements**
**The Grantee will:**

- A. Provide PBF with annual financial statements and operational reports describing the use of the funds, plus status and outcomes of the activities. Such reports will be provided within 90 days of the Grantee's fiscal year end that includes part or all of period of the Grant.

**ADDITIONAL TERMS for grants supporting construction projects****The Grantee will:**

- A. Make arrangements for construction with contractors, subcontractors, vendors, suppliers, and others to complete construction to achieve the Project, and oversee and coordinate with all to ensure the Project is successfully achieved.
- B. Work with PBF's representative to assist Grantee in developing a construction plan.



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- C. Assist PBF's representative in monitoring construction by providing progress reports, and by providing logistic support for site visits during and after completions of construction.
- D. Assist PBF's representative in obtaining photographs and videos and other records of the construction, classrooms, students, teachers, staff and village. Photos will be used by PBF for documentation and to communicate with PBF donors.
- E. Communicate regularly about the Project's status with PBF's representative, who is responsible for a) assuring compliance with the terms of the Agreement, and b) notifying PBF officers of progress, and of any problems or issues that may arise.
- F. Prepare and transmit to PBF's representative a detailed report of costs and provision of invoices and receipts, within 90 days following the Project end date.
- G. Report to PBF's representative, when and how any new or renovated building is being used, including the numbers of students per classroom and grade level, within 180 days of completion.
- H. Provide requested information after completion, on an ongoing basis, as requested by PBF, such as the number of students by age and by gender.
- I. Acknowledge that PBF's representative represents PBF's interests will all persons and in any every aspect of the Project.
- J. Transfer funds agreed to per Budget to the account of Grantee in one or more installments beginning within the later of 30 days from signing this Grant Agreement or the start date of the Project.

**SIGNATURES**

Signed \_\_\_\_\_ Date: \_\_\_\_\_

Print \_\_\_\_\_ for \_\_\_\_\_  
Grantee Representative Name and Title Name of Grantee Organization

Signed \_\_\_\_\_ Date: \_\_\_\_\_

Print \_\_\_\_\_  
Partners for Better Futures Country Representative or Officer Name