INITIAL APPLICATION FOR GRANT FOR
EDUCATIONAL HOUSE OPERATING COSTS FROM
MIT INDEPENDENT RESIDENCE DEVELOPMENT FUND

A. Instructions.

This form of Initial Application for Grant for Educational House Operating Costs (“Application”) must be used to request a grant for educational house operating costs by any Independent Living Group (“ILG”) that has not previously received approval for a grant for educational house operating costs from the Independent Residence Development Fund (“IRDF”) of Massachusetts Institute of Technology (“MIT”). An ILG requesting a grant for any costs of constructing, renovating, furnishing or equipping educational areas of ILG residences or making the residences accessible to students with disabilities must use the form of General Application for Grant from Independent Residence Development Fund. An ILG that has previously received IRDF approval for a grant for educational house operating costs must use the form of Periodic Request for Grant for House Operating Expenses from MIT Independent Residence Development Fund to request additional grants for educational house operating costs.

The ILG must complete Section B (Request for Grant) and sign Section C (Certification and Agreement). A member of the ILG’s Alumni Board must also sign Section C. For additional information on the IRDF grant program and the kinds of expenditures that may qualify for grants, see the Additional Information about Grants Awarded by the MIT Independent Residence Development Fund and the form of the Agreement to Terms and Conditions of Grant by Massachusetts Institute of Technology Independent Residence Development Fund to ILG, which are available from the IRDF Grant Committee. IRDF grant program forms and information are also provided through the FSILG Office at the address below and on the FSILG Office website.

The completed Application should be filed within twelve months after the end of the fiscal year in which the house operating costs are incurred. Assistance in completing the Application may be provided by the FSILG Cooperative Incorporated (E32-133 or 617-452-4053). The completed Application should be hand-delivered to:

FSILG Office, W20-549
MIT Student Center
Attention: Fran Miles
77 Massachusetts Ave.
Cambridge, Massachusetts 02139

The FSILG Office will record the Application and forward it the IRDF Grant Committee at the MIT Office of the Treasurer. The Grant Committee will review the Application and notify the ILG of the results of its review. MIT’s outside legal counsel will make the final determination of which proposed expenditures qualify as being solely for educational purposes or for the purpose of compliance with laws on access by students with disabilities.
This Application may be used only to request grants to pay operating costs associated with areas of the house that are used solely for educational purposes or to pay the costs of maintaining compliance with laws on access by students with disabilities. An area will not qualify as being used solely for educational purposes if the area is or has been used for dining, recreational or social activities or for any purpose other than the conduct of activities that are necessary or appropriate for students’ fulfilling the requirements of the degree-granting programs in which they are enrolled, regardless of whether the area is also used for educational purposes. Operating costs associated with areas of the house that are used solely for educational purposes may qualify for a grant only if such areas are similar to the facilities provided by MIT for the education of its general student body. These costs may include: casualty and liability insurance premiums; utilities; real and personal property taxes; costs for required health and safety items; and non-capital repairs. (Rent may be a qualified cost only if paid by an ILG to an unrelated party under a true lease with fair market value terms.)

B. Request for grant.

1. (a) Name and mailing address of ILG (house corporation) applying for the grant (the “Applicant”).

   Alpha Beta Chi Alumni Corporation
   PO BOX 44837
   Cambridge, MA 02139

(b) Name and physical address of the local chapter, if any, of the Applicant.

   Alpha Beta Chi Fraternity, Phi Kappa Chapter
   500 Beacon Street
   Boston, MA 02115

2. Number of MIT students living at the house.

   30

3. Is the entity listed in the answer to Question 1(a) a for-profit entity or a tax-exempt entity (e.g. a 501(c)(3) or 501(c)(7) organization)? If the entity is tax-exempt, include a copy of the determination letter received from the Internal Revenue Service.

   It is a 501(c)7. Please see attached letter.

4. State the twelve-month period for which you are requesting a grant for house operating costs, including the beginning and end dates of such period. Grants may be made only for house operating costs associated with areas that are used solely for educational purposes during the entire twelve-month period.

   July 1, 2003 – June 30, 2004
5. Are any of your house operating costs specifically attributable to the educational areas or the non-educational areas of the house? If yes, describe in detail the amounts and types of those costs and how you determined that those costs are specifically attributable to educational areas or non-educational areas. Attach copies of invoices and receipts evidencing these operating costs.

$1123. Please see attached

6. If any of your house operating costs are not specifically attributable to educational or non-educational areas of the house, what are the total amounts of such operating costs for the house for the period for which the grant is requested? Provide a detailed schedule. A sample form of schedule is provided online at http://www.fsilg.coop. Applicants requesting grants for rent costs must provide a copy of the house lease agreement. (Please note that Applicants are required to retain copies of all receipts and invoices evidencing operating costs for a period of three years after the date of grant approval.)

$92,182. Please see attachment for details.

7. Specify the total net assignable square footage of the house. For purposes of this Application, “net assignable square footage” means the sum of the square footage of all areas on all floors of the house that are available for occupancy or a specific use. These areas must include all bathrooms and common areas but may exclude areas used for stairs, circulation corridors and utility space. Applicants that have had a floor plan prepared on the MIT Insite Program (the “Insite Plan”) must specify the amount of net assignable square footage reflected on the Summary Table of Building Areas prepared in connection with the Insite Plan (the “Summary Table”).

4,451 sq. ft. Please see attachment for details.

8. Specify the total educational square footage of the house. For purposes of this Application, “educational square footage” means the net assignable square footage of the house that is used solely for educational purposes during the entire twelve-month period listed in Question 4. Do not include any educational areas that are also used for any non-educational purposes. Attach floor plans that clearly indicate educational areas and non-educational areas and provide the name of the entity that prepared such floor plans. Applicants that have had a floor plan prepared on the Insite Plan must specify the educational square footage reflected on the Summary Table and attach a copy of such floor plans along with the Summary Table.

889 sq. ft. Please see attachment for details.

9. Enumerate all the educational areas in the house and the purpose or purposes for which they are used. Applicants that have completed an Insite Plan may refer to the Summary Table and provide a statement that the Summary Table accurately reflects the educational areas the house and describes the purposes for which they are used.
The Summary Table accurately reflects the educational areas in the house and describes the purposes for which they are used. Please see attachment for details.

10. Calculate your “educational use percentage.” Educational use percentage is calculated by dividing the total educational square footage of the house (determined under Question 8) by the total net assignable square footage of the house (determined under Question 7).

   **19.98%**

11. Unless the facts indicate that a different method of allocation is appropriate (for example, if invoices indicate that the house operating costs for some areas are greater than for others), the amount of the operating costs that are not specifically allocated pursuant to Question 6 that may be funded by this grant is calculated by multiplying the total of the house operating costs listed in Question 6 ($__________) by your “educational use percentage” determined under Question 10 (_________%).

   **$18,418**

12. Total requested grant amount – add the amount determined under Question 11 to the amount of the house operating costs specifically attributable to the educational areas as determined under Question

   **$19,541**
C. Certification and Agreement.

The Applicant certifies to MIT that the Applicant has read the Instructions in Section A and that the information included in this Application and any attachments to it is true and complete. The Applicant understands that any misrepresentations contained in the Application or the attachments to it could result in forfeiture and repayment of any grant awarded by the IRDF. The Applicant certifies to MIT that all funds transferred by MIT to the Applicant, as a grant made pursuant to this Application, will be used solely as reimbursement for those operating costs described in Section B which are operating costs associated with areas of the house that are used solely for educational purposes or costs of maintaining compliance with laws on access by students with disabilities, as described more fully in the Instructions in Section A.

The Applicant agrees to maintain detailed books and records about the purpose, date, amount and payee of the expenditures for which a grant is being requested and such other information as will enable MIT to verify that the grant is used only for purposes permitted by this Application. The Applicant agrees to make the books and records maintained in accordance with this Application and copies of them available to MIT and MIT’s representatives at such times and such places as MIT reasonably requests. The Applicant agrees that MIT and its representatives have the right to inspect the areas involved in the Application to determine compliance with the terms of the grant.

ILG

________________________  ___________________  ____________________
Name        Title        Date

Alumni Board of ILG

________________________  ___________________  ____________________
Name        Title        Date