

AmerisourceBergen
Foundation
grant guidelines

The AmerisourceBergen Foundation

The AmerisourceBergen Foundation is an independent, not-for-profit charitable giving organization, established by the AmerisourceBergen Corporation with a mission to improve the health and wellbeing of patient populations – both human and animal – by partnering with organizations to expand access to healthcare in order to advance health equity.

Areas of impact

Through an invitation-only grant process, the AmerisourceBergen Foundation collaborates with organizations to implement projects with the common objective of providing everyone, both humans and animals, with a fair and just opportunity to be as healthy as possible. Specific areas funded include:

- **Human health:** Supporting human health-related causes around the globe focused on access to healthcare for underserved populations
- **Animal health:** Improving the health of service, disaster response, companion and production animals that support humans around the globe
- **Prescription drug safety:** Combatting prescription drug misuse in the U.S. through safe disposal and innovative solutions.

Eligibility

- Grant programs at the AmerisourceBergen Foundation are all invitation-only.
- Proposed projects or programs must align with the Foundation's mission and areas of impact.
- The following types of organizations do not meet eligibility requirements and will not be invited to submit a request for funding:
 - Customers of AmerisourceBergen or organizations that have any type of business relationship or have had any type of business relationship in the last two years with an AmerisourceBergen Corporation business entity;
 - Hospitals, health systems, hospital/health system foundations or physician practices or any other hospital/health system related entities;
 - Municipalities or government agencies;
 - Governmental entities with regulatory oversight over AmerisourceBergen.
- The Foundation will not consider grants for the following:
 - Academic or scientific research;
 - Media or advertising (e.g., public service announcements);
 - Treatment-related services;
 - Pharmaceuticals;
 - Funding for new permanent positions (consultants or contractors are acceptable);
 - Programming within a hospital, health system or physician practice.
- Submitting a proposal does not guarantee funding.
- Grant funds may only be used for charitable purposes.
- The applying organization cannot lobby as a substantial portion of its activities or support political causes or campaigns. The Foundation does not fund efforts to influence legislation, to intervene in political elections or campaigns, to promote propaganda, or to conduct voter registration drives.
- The Foundation may fund a project or program of a non-profit led community coalition that includes one or more customers/customer affiliate (as long the customer is a non-profit entity) as long as the following conditions are met: (1) the grant must be restricted for charitable purposes, (2) the grant may not be paid to the customer or its affiliate, and (3) the coalition must be memorialized by a letter of intent or memorandum of understanding.
- The Foundation does not make grants or loans to individuals and does not directly fund fellowships or prizes.

- The proposed project or program cannot be limited to serving a narrowly defined group of individuals but must instead serve a broad and indeterminate charitable class.
- The Foundation reserves the right to adjust guidelines without prior notice and can choose to not advance any proposal for any other reasons, such as excessive requests, competitive standing, lack of alignment or situational considerations.

Request for funding

All requests for funding are submitted via YourCause, the Foundation's online grants management tool. Applicants are expected to provide the following during the request for funding process:

- A completed online proposal form
- Program budget
- Program budget narrative

When completing the proposal form applicants will be required to provide the following information:

- Project overview, goals and anticipated outcomes and impact
- Community need
- Alignment with Foundation programmatic and organizational goals
- Partner organizations
- Information about the population and community served by the project
- Organizational diversity, equity, and inclusion practices

Organizations requesting funding should exhibit sound financial management. In addition to program budgets, organizations may be asked to provide organizational 990s.

Grant review criteria

Foundation staff and our Grantmaking Committee will consider the following during proposal review:

- Alignment with Foundation mission and areas of impact
- Proposed approach for project implementation
- Evidence of overall project sustainability
- Quantifiable impacts and deliverables
- Appropriate amount of funding requested to meet the proposed deliverables
- Complete budget and budget narrative that identifies where and how the awarded funds will be spent
- Preference is given to projects with larger impact either by number of people affected or geographic focus and support of underserved populations

Grant review process

The Foundation utilizes the following process for grant review and decision-making:

- Organizations will be invited to submit a grant proposal and supporting information to the Foundation via YourCause.
- Foundation staff review grant proposals and supporting information based on the criteria details above and make funding recommendations to the Foundation Grantmaking Committee.
- The Foundation Grantmaking Committee reviews staff funding recommendations and makes final funding decisions. As per Foundation policy, the Foundation Grantmaking Committee has authority to make final decisions on all funding

requests under \$100,000. Any requests over \$100,000 will be reviewed by the Foundation Grantmaking Committee then submitted to the Foundation Board for final approval.

- Organizations will receive notification of funding decisions via the YourCause Grants Portal. Organizations approved for funding will be required to complete and submit a grant agreement. All payments are made directly to the organization approximately 60 days following the close of the month in which the grant agreement was completed.

Performance reporting

- All recipients of Foundation grants will be expected to provide the Foundation with performance metrics on an annual basis via the provided forms in the YourCause Grants Management portal.
- All grantees should expect to have at least one project status conversation with Foundation staff every six months for the duration of their funded project.

Foundation governance

The Foundation is governed by a majority independent Board of Directors. A Grantmaking Committee made up of leaders from across the enterprise is responsible for reviewing applications, resolving questions, interpreting eligibility requirements, and approving requests for grants. Together, the Foundation Board of Directors and Grantmaking Committee provide effective, on-going decision-making on behalf of the Foundation.

Foundation commitment to diversity equity and inclusion

The AmerisourceBergen Foundation fosters diverse, equitable and inclusive partnerships that create healthier lives and communities. We aim to advance health equity and access to healthcare by collaborating with organizations who strive for diversity, equity and inclusiveness in their own organizations and the communities they serve, as we partner to create healthier futures.

About AmerisourceBergen Corporation

AmerisourceBergen Corporation fosters a positive impact on the health of people and communities around the world by advancing the development and delivery of pharmaceuticals and healthcare products. As a leading global healthcare company, with a foundation in pharmaceutical distribution and solutions for manufacturers, pharmacies, and providers, we create unparalleled access, efficiency, and reliability for human and animal health. Our 22,000 global team members power our purpose: We are united in our responsibility to create healthier futures. AmerisourceBergen is ranked #10 on the Fortune 500 with more than \$185 billion in annual revenue. Learn more at www.amerisourcebergen.com.

More about the AmerisourceBergen Foundation at <https://www.amerisourcebergen.com/foundation>.

Questions? Please email us at abfoundation@amerisourcebergen.com.