

GRANT DISTRIBUTIONS GUIDELINES

OVERVIEW

The main objective of Rotary is service — in the community, in the workplace, and throughout the world. The Rotary Club of Simi Sunrise Rotarians are dedicated to developing community service projects that address many of today's most critical issues, such as children at risk, poverty and hunger, the environment, illiteracy, and violence. The club also supports programs for youth, educational opportunities and international exchanges for students, teachers, and other professionals, and vocational and career development. The Rotary motto is “Service Above Self”.

The Cajun-Creole Music Festival is an exciting fundraiser for our club. It is our biggest fundraiser of the year with over 2,000 volunteer hours invested in its success every year. One hundred percent of all Festival profits are donated in support of charitable, educational and humanitarian causes. It allows us to support the many charitable organizations and groups that address many of the same critical issues that are important to all of us.

Although we sincerely wish we could fulfill every request for funding support, requests generally far exceed the funds available. For this reason, it has become necessary to establish criteria to assist the **Rotary Club of Simi Sunrise Allocations Committee** in deciding where the funds may be most effectively employed for the betterment of the community.

Organizations interested in requesting our support through funding are strongly encouraged to call or visit the Rotary Club of Simi Sunrise's website to review the application process and acquire the necessary forms. A grant request will be accepted if the proposed initiative fits within the Rotary Club of Simi Sunrise's guidelines.

REQUEST PROCEDURES

The **Grant Request Form** must be completed and sent along with any letter you may be submitting to request funds as well. Grant requests should be submitted with the following attachments (unless it can be absolutely confirmed that the Allocations Committee already has these documents on file from previous requests):

- IRS Section 501[c][3] Tax Determination Letter
- Article of Incorporation and by-laws
- Current IRS Form 990
- List of previous grants received from the Rotary Club of Simi Sunrise

GRANT MAKING CONSIDERATIONS

All grant awards shall be subject to the vote of the Allocations Committee. Further, it is not the intention of the Allocations Committee to establish a permanent and dependent grant relationship with grantees. Likewise, with regard to types of grants and organizations supported, the Allocations Committee, with few exceptions, does not make awards for:

- Pass-through grant support through a third party
- Direct scholarship support to individuals
- Purchase of tickets or advertising for benefit purposes
- Coverage of continuing operating deficits
- Document publication
- Groups such as fraternal organizations, political parties or candidates, veterans, labor or local civic groups, and groups engaged in influencing legislation.

(Exceptions are made only on a case by case basis)

REVIEW PROCESS

The Allocations Committee meets quarterly. The Rotary Club of Simi Sunrise accepts proposals year round and requests are generally addressed at the next available meeting.

The Rotary Club of Simi Sunrise puts forth its best effort to prepare grant requests as comprehensively as possible for review at an upcoming meeting. At the committee's discretion, a site visit may be requested as part of the proposal evaluation process. A committee member will contact the requesting organization during the proposal analysis process if additional information is required.

GRANT AWARD PROCEDURES

Following all grant requests, The Rotary Club of Simi Sunrise Allocations Committee, will make its recommendations for organizational funding known to The Rotary Club of Simi Sunrise's Board of Directors. Upon approval by the Board of Directors, a grant award packet will be forwarded to the grantee containing the following items:

- Grant Award Letter indicating the Board's positive response to the request and the amount awarded.
- Grant Agreement to be signed and returned promptly to the Rotary Club of Simi Sunrise by the grantee. The Grant Agreement outlines the mutual responsibilities of both the grantor and the grantee.
- When the grantee returns a signed original Grant Agreement to the Rotary Club of Simi Sunrise, the grant award check will either be sent promptly to the grantee or, in the case of the majority of checks, will be distributed during our annually scheduled Awards Rotary Meeting, scheduled in the Fall, following the Cajun-Creole Music Festival when grantees are invited to receive recognition for their organization as well. Grant award checks are handed out to all attending organizations at that time.

Rotary Club of Simi Sunrise
GRANT REQUEST FORM

BACKGROUND INFORMATION

Request date: _____ Employer I.D. No.: _____

Federal Tax Determination Date: _____ Fed. Tax Exemption Classification: _____

Name of Organization: _____

Complete Address: _____

Telephone No.: _____ Fax No.: _____

Director/CEO: _____

Contact Person: _____ Title: _____

Email Address: _____ Web Address: _____

Mission of the Organization: _____

Amount Requested \$: _____

Proposed use of grant funds: _____

Has the organization received funds previously from the Rotary Club of Simi Sunrise:

YES _____ NO _____

This grant request is being submitted with the knowledge and authorization of the Board of Directors.

Name: _____, Board President/Chair

Signature: _____ Date: _____

Return this application and other required documents to:

Rotary Club of Simi Sunrise

Allocations Committee

P.O. Box 11

Simi Valley, CA 93063

Tel: (805) 517-9000