



Benzie Sunrise Rotary Foundation, Inc.

Grant Program

Guidelines for Application Submission:

The following guidelines govern the award of all grants made under the auspices of the Benzie Sunrise Rotary Foundation, Inc (hereinafter referred to as "the Foundation"). Please read this entire document prior to completing a grant application.

- I. GENERAL PROVISIONS. The Foundation is a Michigan nonprofit corporation and has been recognized by the Internal Revenue Service as a 501(c)(3) tax-exempt organization. All contributions to the Foundation are tax-deductible to the extent allowed by law. Funds raised by the Foundation through individual gifts and sponsored events support a variety of projects and activities that assist in the development of our youth and enhance the quality of life in our local community and beyond.
- II. Foundation funds are available to qualifying applicants upon grant approval by the Foundation's Board of Directors and the applicant's compliance with all Foundation requirements.
- III. Grants are awarded to qualifying applications that are designed to support projects that will assist in the development of our youth and enhance the quality of life in our local community and beyond.
- IV. While the primary purpose of the Foundation is to support projects that will assist in the development of our youth and enhance the quality of life in our local community, the Foundation also may support any project of Rotary International or any Rotary Club or Rotary District, as well as any relief effort directed to a local, state, national or international emergency, disaster or catastrophe.
- V. The Foundation Board of Directors shall consider for approval projects from groups or organizations who have submitted grant applications to the Foundation.

- VI. In reviewing grant applications, the Board of Directors will apply the following criteria and recommend only projects conforming to these guidelines. All other applications will be rejected or returned to applicants.
- VII. ELIGIBLE APPLICANTS. Any organization, association or other entity, whether formally incorporated or not, that has, as a minimum, a unique federal employer identification number (EIN) issued by the Internal Revenue Service. Unless within the exclusions below, eligible organizations or groups may apply for a grant for a qualifying project or activity.

Applicants seeking a grant shall not discriminate against any member, person or other user of its services, facilities or equipment on the basis of age, race, color, sex or national origin. Applicants are not required to be members of or have association with Benzie Sunrise Rotary Club to receive funds under this grant program. The following organizations are not eligible for grants:

- Political candidates or organizations
- Labor organizations
- State Fund Committees
- Private businesses except those (such as private schools and hospitals) organized and operated exclusively for charitable, scientific, literary or educational purposes
- Religious organizations for the purpose of fostering religion
- Other organizations or groups that have not been assigned federal employer identification number by the Internal Revenue Service. (A signed copy of IRS Form W-9 disclosing this number must be included with all applications.)

- VIII. PROJECTS/ACTIVITIES ELIGIBLE FOR FUNDING. Grant requests must conform to, and foster the purposes set forth in the Foundation Articles of Incorporation and Bylaws. These purposes are included in the guidelines set out above.
- IX. RESTRICTIONS ON FUNDING. The following activities or projects are not eligible for funding:

- Projects which confer a private benefit upon the members of the applying club or group. (NOTE: Organizations may be private or open only to members, PROVIDED that the project or activity for which funding is sought is open to the public).
- Deficit financing.
- Projects for commercial ventures.
- Applications from organizations or groups that have not submitted final reports for previously awarded grants.

The following limitations / restrictions apply to grants which are otherwise eligible for funding:

No funding will be awarded to an applicant for payment of administrative fees, office overhead, or other similar charges.

The Foundation does not approve multi-year funding of projects.

Requests must be submitted for consideration each year, and the fact that funds were awarded in one year shall not be construed as a guarantee of funding in subsequent years.

X. **COMPLETING THE APPLICATION.** All applications for grants must be submitted on official Foundation application forms. These application forms are available from Benzie Sunrise Rotary Club members as well as the Club website. All requested information must be provided at the time of application including EIN/TAX ID Number, and a signed consideration agreement. In order for grant applications to be promptly considered by the Foundation, they must be received by the Board of Directors prior to the application deadlines which are January 10th, April 10th, July 10th, and October 10th each year.

XI. The Foundation Board of Directors shall review each application to ensure that it has been completed properly, with all required documentation supplied. Applications that do not contain all required information and attachments will not be considered for funding.

XII. **FINAL REVIEW/APPROVAL PROCESS.** Applications will be subject to the following review process:

Step 1: Applications undergo a thorough review by the Foundation Board to ensure that both the applicants and their projects are eligible for funding under current IRS rules and regulations. Eligibility determinations made by Foundation Board shall be deemed final.

Step 2: Upon completion of in-house review, projects deemed not to meet eligibility criteria will be returned to the applicants with notice that the project has not qualified for funding.

Step 3: Following affirmative vote of the Board of Directors, the Foundation President will notify the applicant that the grant has been approved and request a check from the Foundation Treasurer. A n applicant should generally receive the check within thirty days of notification that the grant has been approved. Included with the grant check will be a Final Report form that must be completed and returned. (see section XIII).

XIII. POST- DISBURSEMENT REQUIREMENTS. Regulations adopted by the Internal Revenue Service require that the Foundation continue to account for the use of grant monies by the grant recipient. Any organization or group awarded a grant by the Foundation must, upon completion of the project or activity, complete and return to the Foundation a Final Report detailing and accounting for how the grant funds were spent. Grant funds may only be expended in furtherance of the project documented on the grant application. Final Reports should be as complete as possible and include receipts for items purchased with grant funds.

Failure to submit the Final Report on a timely basis or expending grant funds for purposes other than those for which they were sought will preclude the award of further grants to the grant recipient. In addition, the Foundation reserves the right to and will demand return of grant funds that were not spent for the purposes for which the grant was awarded. Such a demand may include the initiation of legal proceedings, where appropriate, to recover misused funds. Unused grant funds should be returned to the Foundation so that they may be made available to other applicants.

Thank you for your interest in the Foundation's grant program. Your cooperation and compliance with the above guidelines will help ensure that the grant program is operated in strict compliance with requirements of federal laws governing the operation of charities. Should you have any question regarding this program, please contact the Foundation President.

Benzie Sunrise Rotary Foundation, Inc. ATTN: Grants

www.benziesunriserotary.org/