

**ROTARY CLUB OF ORLANDO FOUNDATION, INC.**  
**STATEMENT OF GIVING**

The Rotary Club of Orlando Foundation, Inc. (the “Foundation”) has promulgated this Statement of Giving for the purpose of complying with its Articles of Incorporation and Bylaws in connection with making financial awards to applicants for funding their activities.

Specifically, the **purposes** for which the Foundation was organized, as stated in Article II of the Articles of Incorporation, are to provide:

- “Scholarship aid to local students”
- “Health care aid”
- “Relief from hunger and poverty” and
- “Humanitarian aid to the needy in any area”

And to operate exclusively for:

- “religious, charitable, scientific, literary, or education purposes” or for
- “the prevention of cruelty to children or animals,”

including making awards to 501(c)(3) organizations exempt from taxation.

The Foundation’s contributions to others shall be limited by Article X of the Articles of Incorporation. Examples of these limitations are:

- No part of the net earnings of the Foundation shall inure to the benefit of any member, officer, or director of the Foundation, or to any private individual (except in payment for services rendered for the benefit of the Foundation),
- No member, officer, director of the Foundation, and no private individual, may share in the distribution of any of the Foundation’s assets on dissolution of the Foundation,
- No substantial part of the activities of the Foundation shall be to carry on propaganda, or to attempt to influence legislation, or to participate in any political campaign, and
- Self dealing by the Foundation is prohibited.

According to Article VI, Section 1(b) of the Articles of Incorporation, **ALL** grants for financial assistance shall be in accordance with the purposes of the Foundation as expressed above.

Accordingly, the Awards Committee may only recommend to the Board of Directors of the Foundation, and the Foundation’s Board of Directors may only make, awards of financial assistance that comply with these **purposes** of the Foundation, and which are not prohibited by the Articles of Incorporation of the Foundation.

Because the funds that the Foundation may award each fiscal year are affected by the market and are limited, worthy applicants might be denied. If so, applicants are welcome to re-apply in the following fiscal year (July – June) of the Foundation.

In addition, all applicants for financial awards or grants must comply with the following **Guidelines**:

**ROTARY CLUB OF ORLANDO FOUNDATION  
GRANT APPLICATION GUIDELINES 2015-2016**

PLEASE READ THE FOLLOWING GUIDELINES CAREFULLY:

1. If an organization, the Applicant must be registered as a not-for-profit corporation pursuant to Chapter 617, Florida Statutes and approved as a tax-exempt organization as defined in s 501 (c) (3) of the Internal Revenue Code.
2. Direct financial awards to individuals will not be considered, except in the case of scholarship aid to worthy students.
3. The Applicant should primarily fulfill its purpose in Orange, Seminole, and Osceola Counties.
4. Due to limited available funds and the number of applicants annually, Applicants who have received Rotary Club of Orlando Foundation funds within the past three years (five years for capital projects or improvements) may be subordinated to other Applicants.
5. The Rotary Club of Orlando receives numerous funding requests from many deserving organizations throughout the year. In order to provide as much assistance to as many parties as we can, we ask that grant requests be limited to amounts of \$2,000.00 or less.
6. An Applicant may submit only one application between July 1 and June 30.
7. The Foundation will not consider a grant for long-term improvements where a short-term lease is involved.
8. Applicants agree to provide, if requested, access to representatives from the Rotary Club of Orlando Foundation for a site visit and/or a meeting with representatives of the Applicant to present and discuss the application.
9. Responses are required for each question on the application. Please confine responses to the spaces indicated in the application. Do not reformat the Application form.
10. Should Applicant receive adequate funds from other sources prior to an award from Rotary Club of Orlando Foundation, Applicant agrees to notify the Foundation and withdraw their application.
11. Rotary reserves the right to make either an outright gift or to condition its grant on a reimbursement basis.
12. The Applicant agrees to inform Rotary Club of Orlando Foundation of the completion of the funded project and further agrees to an inspection of the project and a review of financial information by Rotary Club of Orlando Foundation to verify funds were spent in accordance with purposes specified in the application. If it is determined by Rotary Club of Orlando Foundation that the funds were spent contrary to the purposes outlined in the application, the Applicant agrees to refund Rotary Club of Orlando Foundation the full amount of the grant award immediately upon demand.
13. If awarded funds, and if requested the Applicant agrees to install a plaque or signage to be provided by Rotary Club of Orlando Foundation recognizing the contributions of the Rotary Club of Orlando Foundation.
14. If you have questions regarding these guidelines or the application, contact Jamie Sooter at (407) 603-5098 for further guidance.

**Rotary Club of Orlando Foundation  
Application for Grant**

Please forward your completed package to The Awards Committee, Rotary Club of Orlando Foundation, P.O. Box 560388, Orlando, FL 32856-0388, or via email to [admin@orlandorotary.org](mailto:admin@orlandorotary.org)

Date: \_\_\_\_\_  
Applicant: \_\_\_\_\_  
Address: \_\_\_\_\_  
Website: \_\_\_\_\_  
Contact Person: \_\_\_\_\_  
Phone(s): \_\_\_\_\_  
Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Description, History and Mission of the Applicant: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Geographic Area Served: \_\_\_\_\_  
Year of Incorporation: \_\_\_\_\_  
Is the Applicant a Not for Profit Corporation? Yes/No  
Is the IRS Tax Status a 501 (c)(3)? Yes/No  
Is the Applicant a Unit of Government? Yes/No  
Who referred you to the Rotary Club of Orlando Foundation? \_\_\_\_\_

Amount Requested: \$ \_\_\_\_\_ Date Funds are Needed: \_\_\_\_\_  
Proposed Use or Purpose of Funds: \_\_\_\_\_  
Total Project Budget: \$ \_\_\_\_\_ Describe Project:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Project Timeline: \_\_\_\_\_  
Funds on hand for Project: \_\_\_\_\_

Funds Committed for Project by others:  
\_\_\_\_\_  
\_\_\_\_\_

If Applicant's facilities are rented, date lease expires: \_\_\_\_\_

The following documentation is required and should be attached to this application:

1. Brief Proposal to include the following:
  - The community's need for and importance of the project
  - The objective and plan for addressing the need
  - Applicant's qualifications and track record
  - Volunteer involvement
  - Rotary Club of Orlando member involvement, if any
2. A one page budget for the total project and the amount requested with justification
3. A copy of your IRS determination letter confirming your 501 (c) (3) tax exempt status
4. A list of current Board of Directors and Officers
5. Copies of your most recent audited financial statements (if audited financials are not available, provide signed unaudited financials)
6. Current operating budget
7. A copy of your Articles of Incorporation
8. Letters of support or other information you believe the Foundation should have for evaluation of your request (not more than 3 such items)

Also attached to this application is Applicant's detailed and specific description of the the expenditures and/or disbursement that shall be made of any and all funds provided by the Rotary Club of Orlando pursuant to this grant request. I (we) further agree that upon within sixty (60) days of the conclusion of the project or activity that this grant is funding, that a detailed report regarding the results of this grant shall be provided to the Rotary Club of Orlando, and said report shall include a detailed and specific description of the expenditures made of any and all funds received pursuant to this grant and detailed outcome measures for the use of any and all funds received pursuant to this grant.

The Applicant understands that the Guidelines apply both to the grant process and to the grant and agrees to abide by and adhere to those Guidelines. As the organizations' authorizing official, I certify that the information contained in this application is true and correct.

Authorizing Official of Applicant: \_\_\_\_\_ (Signature)  
\_\_\_\_\_ (Print Name)  
\_\_\_\_\_ (Title)

\_\_\_\_\_  
Rotarian Sponsor (Print Name)