

Community Service Grant Application

Rotary Club of Beaverton

Applicant Instructions And Form

Definitions:

Community Grant: A transfer of funds, with conditions, to support a humanitarian service in the Beaverton area.

Project: a service endeavor of 12 months duration or less, undertaken by the Rotary Club of Beaverton (the Club), either alone or in conjunction with a cooperating organization.

Program: a project going beyond 12 months, with annual evaluation but without requirement of annual reapplication.

Cooperating organization: another community service organization, typically a tax-exempt charitable organization, which either has originated a Project or joins in working on or supporting a Project originated or adopted by the Club.

Sponsor: a member of the Club who proposes that the Club make a community grant for a project.

Community Service Committee: a committee appointed by the Club’s Board of Directors to receive and review applications for projects, interview the sponsors and other advocates for the projects, apply the policies and procedures for community grants adopted by the Club’s Board of Directors, and make recommendations to the Boards of Directors of the Club and the Beaverton Rotary Foundation (BRF or Foundation) for or against approval of an application.

INSTRUCTIONS

**Application Process:**

* Complete the Beaverton Rotary Foundation (BRF) Community Grant Application Form and any required attachments.
* At least two Beaverton Rotarians must sponsor the project.
* Transmit an electronic copy of the application and attachments to the Chair of the Community Service Committee by 5:00 p.m. on the last day of the announced time limit for submission of applications.
* Late or incomplete applications will not be considered.
* The Community Service Committee will interview the applicant, evaluate the application and report its evaluation and recommendation to the Beaverton Rotary Club Board of Directors and the Beaverton Rotary Foundation Board of Directors.
* The applicants will be notified of the final decision of the Foundation.
* The grant will be confirmed in writing, which will specify the grant amount and any conditions.

Requirements for a Community Grant

* Beaverton Rotarians should have knowledge, interest and intended personal involvement with the project.

* The project must be "arms length"— no Beaverton Rotarians or family members may receive personal gain from the project.
* The Club encourages projects in which Beaverton Rotary Club partners with existing public, private or non-profit organizations with a good record of success in delivering the specified services. The intent is to take advantage of existing community resources and/or leverage our funding through such resources.
* The project must be completed within 12 months of receipt of the funds or within the “sunset” limit for a project designated as a potential “program.” If a 12-month project is not completed within that time, the applicant must submit a letter requesting an extension and explaining why the project has been delayed. The BRF may agree to an extension or require that all funds be returned to the BRF.
* Alternatively, if the applicant believes that the project has potential to become a continuing program of the Club, the applicant should specify that intent and suggest a time limit, or “sunset,” for the program, by completing section 1. H of the application. Such projects are subject to the same re-application and reporting as other projects at the end of the first and second years. The second report should include a request that the project be confirmed as a continuing program and an explanation of why the Club should adopt it as such. If accepted as such by the Club and the Foundation, it will continue to be subject to annual reporting and evaluation but not annual re-applications, commencing at the end of the third year.

* Projects should have specific and measurable goals that are achievable within the first 12 months after the funds are received or within the “sunset” limit for a project designated as a potential “program.”
* The applicant must submit a report at the end of the first 12 months, or annually in the case of a program, stating the extent to which the project’s or program’s goals have been achieved and the other representations in the application have been fulfilled. Projects and programs are subject to re-evaluation at the end of the 12-month period or at the end of the accepted sunset limit in the case of a program.
* Submission of the final report and acceptance of that report by the BRF will constitute completion of the project or program. The report will include a description of the project outcomes and a detailed accounting, including receipts for all items purchased with grant funds. Receipts are not required when funds are granted in support of another organization’s humanitarian and/or educational mission.
* The Club does not approve grants for the benefit of:
* Individual Club members or their families
* Dues or other membership fees of Club members or their families
* Administrative expenses of another organization
* Religious, fraternal or professional sports organizations, per se
* Political campaigns, causes or organizations.

 Community Grant Application

Form

**(NO FUNDS WILL BE DISBURSED, AND NO WORK SHOULD BE COMMENCED ON A PROJECT UNTIL THE GRANT IS APPROVED.)**

**Project Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Submitted\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of cooperating organization (the legal entity involved in or primarily responsible for implementation of the project):**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name and title of primary contact person in the cooperating**

**organization**:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Street Address of the organization** (not a postal box office):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_,

City, State, Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone \_\_\_\_\_\_\_\_\_\_ Cell \_\_\_\_\_\_\_\_\_\_\_

**Amount Requested \_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of each sponsoring Club member**:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (tile, if any) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (title, if any \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

At least one of the sponsors is responsible for completing and presenting this application.

Please complete all sections of this application. Attach additional pages as needed or answer the questions below on blank paper in the same order and with numbering as in the application**. Typing of all answers is required.**

Note to applicants: Your answers to the following requests for information will aid the Community Service Committee in its understanding and evaluation of the application. Some of the questions are also intended to stimulate thinking by the applicant. An answer of “no” or that the applicant does not know the answer will not necessarily lead to a negative evaluation of the whole application.

1. **PROJECT DESCRIPTION**
   1. Describe in detail the essential elements of the project.
   2. Describe in detail the needs of the community that have been identified and specifically in what manner they will be met by the project.
   3. What are the specific and measurable goals of the project?
   4. How will the extent of meeting or failing to meet the project’s goals be measured and reported?
   5. Identify which of the sponsors, or other Club members, will monitor the project, provide the Club with “feedback information,” and continue to be an advocate for the project.
   6. Have either or both of the sponsors, or other Club members, been closely involved with the cooperating organization, such as being a board member, officer or frequent volunteer? If so, please explain in detail.
   7. Will any of the sponsors or other Club members, or their respective family members, receive any personal gain from the project? If so, explain.
   8. If the sponsors intend that the project will become a continuing program of the Club, explain why such an outcome is likely, and specify a “sunset” date upon which the program should be re-assessed.
   9. Do the sponsors believe that the project is amenable to publicity that is likely to generate favorable community attention, as well as attract outside funding? If so, describe in as much detail as is currently possible.
   10. Member participation. (a) How will the Club’s members be involved in the project? (b) How many and to what extent?
   11. Community Impact**:**
2. To what extent will successful implementation of the project improve the lives and living conditions of the project’s beneficiaries?
3. To what extent do the sponsors reasonably anticipate that the above benefits will continue beyond the first year?
4. Is there an aspect of the project that is likely to help the beneficiaries to improve their prospects for a more successful future?
5. To what extent will such benefits depend on (i) continuing involvement of the cooperating organization, and/or (ii) the Club’s continued funding and participation in delivery of services?
   1. Other Grants. Does the success of the project depend on receiving funds from other sources, such as a matching grant? Please explain.
   2. Key Dates:
   3. Estimated Start Date of the Project: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   4. Estimated Completion Date of the Project: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   5. Date Funds are required: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
6. **COOPERATING ORGANIZATION**

For the cooperating organization and any other organization that is involved in the implementation of the project, please provide the following information for each:

Check applicable tax-exempt status:

Is it a 501(c)(3) Organization? If so, attach IRS letter determining its tax-exempt status

Other tax-exempt status? Specify:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_-

\_\_ Not tax-exempt)? Explain: \_\_\_\_\_\_\_\_\_\_\_\_

Is tax-exempt status currently valid? \_\_\_\_\_\_ Attach the most recent Form 990 filed with the IRS\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If the cooperating organization involved in the implementation of the project is exempt under another organization, please attach the same evidence of tax-exemption for that organization and explain the relationship between the cooperating organization and the other exempt organization.)

**3. PROJECT BUDGET**

Please keep all receipts. Receipts must be submitted with your final report. Please fill in the following table and in an attached sheet as necessary for completeness:

|  |  |
| --- | --- |
| **Items to be purchased** | **Cost** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **Total Cost** |  |

COOPERATING ORGANIZATION’S CERTIFICATION:

I certify that the above information is correct and that I am authorized by the governing board of the cooperating organization to submit this grant application. Signing this application in behalf of the organization will bind it to the *GENERAL GRANT TERMS, CONDITIONS AND UNDERSTANDINGS*, below.

Organization’s name, which must be the name of the legal entity to which checks for grant funds are to be made payable:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print or type signer’s name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Title \_\_\_\_\_\_\_\_\_ \_

Street Address (not a postal box):

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, Zip \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone \_\_\_\_\_\_\_\_\_\_Cell \_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_

**FINANCIAL INFORMATION**

Attach the most recent financial statement of the cooperating organization, and its most recent IRS annual report

4. **BEAVERTON ROTARY SPONSORS**

At least two Beaverton Rotarians must sponsor each application. These sponsors will monitor and/or coordinate the project, and provide financial accounting to the BRF for the duration of the project or program.

By signing below, we agree to act as the sponsors, work with the cooperating organization towards the successful completion of the project, insure that reports are provided to the BRF as required, and be bound by the GENERAL GRANT TERMS, CONDITIONS AND UNDERSTANDINGS, below

**Beaverton Rotary Project Primary Sponsor Signature**

**Sign here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Print or type name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell \_\_\_\_\_\_\_\_\_\_\_\_

Rotary Position/Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Beaverton Rotary Project Second Sponsor Signature**

**Sign here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Print or type name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell \_\_\_\_\_\_\_\_\_\_

Rotary Position/Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Checklist**

**1. Application filled out in full**

**2. Financial Statement, IRS Annual Report, Tax Return of Cooperating Organization (if applicable)**

**3. Budget filled out**

**4. Signature of Cooperating Organization’s Representative**

**5. Signatures of Two Rotarian Sponsors**

**6. Transmit One Electronic Copy of the application and all attachments to the current chair of the Community Service Committee.**

**Submission:**

**1 Electronic Copy of the Community Grant application and all related materials to:**

[kdailey42@gmail.com](mailto:kdailey42@gmail.com )  **No Later than April 20th at 5:00pm 2018**

|  |
| --- |
| *GENERAL GRANT TERMS, CONDITIONS AND UNDERSTANDINGS*  By submitting this application, the sponsors and the cooperating organization agree to the following, as applicable:  ***Expenditure of Funds:***  *The funds must be used specifically for the designated purpose(s) within the period specified in the grant. If the project cannot be completed within that period, you may submit a letter explaining why the project has not been completed. The Beaverton Rotary Foundation (the “Foundation”) may continue to make funds available to you or withdraw the grant. If the Foundation withdraws the grant you must immediately return the unexpended portion of the grant. If you do not request a continuance, the Foundation will withdraw the grant.*  ***No Assignment or Delegation:***  *You may not assign, or otherwise transfer, your rights or delegate any of your obligations under this grant without prior written approval from the Foundation.*  ***Records and Reports:***  *You are required to keep a record of all receipts and expenditures relating to this grant and to provide the Foundation with a written report summarizing the project promptly following the end of the period during which you are to use the grant funds. Your reports should describe your progress in achieving the purposes of the grant and include a detailed accounting of the uses or expenditure of all grant funds.*  *You also agree to provide any other information reasonably requested by the Foundation. The acceptance of your final report by the Foundation will constitute completion of the project or program.*  ***Tax-Exempt Status (if applicable):***  *You certify that you (the cooperating organization) are a nonprofit organization currently recognized by the Internal Revenue Service as a public charity described in sections 501(c)(3) and 509(a)(1), (2), or (3) of the Internal Revenue Code of 1986 as amended (the "Code"):*  *You are required to provide the Foundation with immediate written notification of any changes in your organization's tax-exempt status.*  ***Publicity:***  *You will allow the Foundation to review and approve the text of any proposed publicity concerning this grant prior to its release. The Foundation may include information regarding this grant, including the amount and purpose of the grant, any photographs you may have provided, your logo or trademark, or other information or materials about your organization and its activities, in the Foundation's periodic public reports, newsletters, and news releases.*  ***Right to Modify or Revoke:***  *The Foundation reserves the right to discontinue, modify or withhold any payments to be made under this grant award or to require a total or partial refund of any grant funds if, in the Foundation's sole discretion, such action is necessary: (1) because you have not fully complied with the terms and conditions of this grant; (2) to protect the purpose and objectives of the grant or any other charitable activities of the Foundation; or (3) to comply with the requirements of any law or regulation applicable to you, of the Foundation or this grant.* |

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Project Number\_\_\_\_\_\_\_\_\_\_\_\_ Date Received\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Approved\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Final Report Received\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_