



Madison Rotary Foundation
Charitable Distribution Committee
Grants and Sponsorships: Giving Philosophy & Procedures
Last revised: Feb 2024

GUIDING PRINCIPLES

Madison Rotary Foundation recognizes the wide diversity of worthwhile charitable causes. As a Madison NJ based organization, our Foundation seeks to focus financial support in three areas:

- Combating food insecurity in New Jersey
- Supporting youth and youth empowerment substantially in Madison
- Local Madison-based or neighboring community non-profit organizations substantially benefiting Madison area residents

Organizations that are based outside the greater Madison area should have either a local chapter in the immediate area or a representative of that organization as an active member of Madison Rotary.

Charitable causes directly aligned with the Rotary organization may apply and will be considered for financial support.

WHAT WE FUND AND DO NOT FUND

There are two distinct categories of financial donations that the Madison Rotary Club funds:

Charitable Grants. Grants may be given to qualified, non-profit, tax-exempt organizations that meet our stated guidelines for charitable distributions. Grant requests for a specific budgeted project are given preference. We will consider grant requests supporting operating expense when the nature of the expense is clearly identified.

Community Sponsorships. Sponsorships may be given to community organizations planning an event or for unforeseen humanitarian causes / disasters.

We do not fund: (a) organizations that only benefit a few; and (b) labor, religious, political, lobbying, or fraternal groups—except when these groups provide specifically identified services that fall within the “Giving Philosophy” stated above.

Regrettably, due to our limited financial resources, we may be unable to fund many of the worthy grants and sponsorship requests we receive.

CHARITABLE GRANTS

Qualifying Criteria

All eligible grantees must be a 501(c)(3) or other similar tax-exempt organization. Information on tax-exempt status is available from the www.irs.gov website.

Size of grants: An important criterion in evaluating a grant proposal will be the size of the grant request relative to the overall size of an organization’s budget. The grant should be meaningful to the organization but not so large as to dominate an organization’s income. Neither should the grant request be so small relative to the overall operating budget that it is deemed by us to be an insignificant financial contribution. Finally, the grant application should make clear how the amount requested (plus other funds as appropriate) will be sufficient to achieve the intended objective(s). Historically, grants from the Madison Rotary have fallen within the \$250-\$1,500 range. In an effort to focus our impact, we will consider grant requests up to \$5,000 where a significant partnership opportunity with Madison Rotary is identified.

Recipients will be required to promote Madison Rotary and will articulate their plan as part of the grant application. *See possible examples below:*

- Create opportunities for Rotarians to Partner with your organization
 - o Print publications
 - o Websites
 - o With organizations memberships
- Present during a Rotarian lunch and or breakfast meeting how the grant money received from Madison Rotary provided an impact to your organization.
- Applicants should make a good faith effort to offer volunteer opportunities to Rotary members, or to the Rotary’s Interact Club members at the Madison High School. These could include Board of Director’s positions, collaborations on community projects or service projects for the Interact Club.
- Include Madison Rotary Grant/Sponsorship as a line item in your annual report.

Madison Rotary evaluates grants annually and may determine to make awards to the same organization in consecutive years. If you received an award in 2023, to be considered for current awards we require a summary of how funds were used, included in your current application.

Budget Guidelines/Accountability

Organizations must include a current financial report or statement in their applications. Based on the complexity and size of its operations, acceptable financial information can be an income statement, balance sheet, a budget or other type of report to be determined in consultation with the Madison Rotary. If available, most recent IRS form 990. Other sources of funding for the organization should also be noted, including support from other Rotary clubs or foundations.

- If the grant is for a specific program or project, we require a project budget be submitted along with details of the project’s impact and sustainability. If for operating expense, detail on how the funds will be allocated within your budget.
- The distribution of funds will normally occur once each year adhering to the schedule outlined below.

Calendar for Charitable Grant Applications

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| Full application available on the club’s website (see below) | March 1 |
| Application deadline | April 30 |
| Grant review period | May - June |
| Notification of grants | End of June |
| Presentation of grants at Rotary Meeting | July |

Organizations must apply for financial support annually. There are no automatic, multi-year or recurring grants.

COMMUNITY SPONSORSHIPS

Qualifying Criteria

Community organizations or groups seeking sponsorships should have a meaningful presence in Madison or be organizing an event that will directly and significantly benefit residents of the greater Madison area. An example could be a 5K Run or Walk Event.

Recipients will be required to promote and partner with Madison Rotary and will articulate their plan as part of the sponsorship application. See possible examples below:

- Create opportunities for Rotarians to Partner with your organization
 - o Signage with Madison Rotary logo
 - o Print publications
 - o Websites
 - o With organizations members

- Present during a Rotary breakfast or lunch meeting how the sponsorship money received from Madison Rotary provided an impact to your organization.
- Applicants should make a good faith effort to offer volunteer opportunities to Madison Rotary members, or to the Rotary's Interact Club at the Madison High School. These could include Board of Directors positions, collaborations on community projects or service projects for the Interact Club.

The sponsorship amount will be influenced by the size of the sponsorship request relative to the overall size of the organization or event. A sponsorship from the Madison Rotary historically falls within the \$250-\$1,000 range.

Organizations seeking sponsorships should provide financial information with their requests. For an event sponsorship, a budget should be provided, showing expected revenue, including fundraising and expenses. For an organizational sponsorship, please provide a current income statement or relevant financial information for the most recently completed fiscal year.

Organizations may apply for sponsorships at any time, and Madison Rotary will respond within approximately eight (8) weeks.

To be considered for possible future sponsorships, Madison Rotary requires a brief written summary of the event (one to two pages) and how the support provided benefit, submitted shortly after the event to madisonrotarygs@gmail.com

HOW TO APPLY FOR CHARITABLE GRANTS AND COMMUNITY SPONSORSHIPS

Organizations seeking grants or sponsorships must adhere to dates and guidelines and complete a written application, including current financial statements. Applications must also include plan for promotion of and partnership with Madison Rotary.

Guidelines and Applications can be found online at www.madisonrotarynj.org.