

Madison Rotary Club
Charitable Distribution Committee
Grants and Sponsorships: Giving Philosophy & Procedures
Adopted Madison Rotary Club Board of Directors – Feb 2019
Last revised: Feb 2019

GUIDING PRINCIPLES

- The Rotary Mission Statement “to provide service to others, promote integrity, and advance world understanding, goodwill and peace through its fellowship of business, professional and community leaders” are the guiding principles used to determine the worthiness of all funds distributed. These same concepts, or parts thereof, should also be in evidence in each of the eligible grantees’ mission statements or operating principles.
- The overall focus of the Madison Rotary Club’s charitable distribution and granting activities is to provide financial support to local, national, and international organizations that serve the public through humanitarian efforts and align with Rotary’s six areas of focus:
 - Peace and conflict prevention / resolution
 - Disease prevention and treatment
 - Water and sanitation
 - Maternal and child health
 - Basic education and literacy
 - Economic and community development

Local examples that could align with our areas of focus include (e.g., disaster relief, food, clothing, shelter, education and training initiatives, local environmental initiatives, arts-related activities, and health-related services (immunization programs, HIV/AIDS initiatives, etc.).

- Preference may be given to organizations that reach traditionally underserved groups and/or organizations that serve the greater Madison community. If the local organization is based outside of the area, it should provide significant service to greater Madison area residents or should, in some way, enhance the quality of life in the Madison area.
- Preference may be given to national organizations or organizations outside the greater Madison area that are seeking grants through the Madison Rotary Club, but these organizations should have either a local chapter in the immediate area or a representative of that organization involved with the Madison Rotary Club.
- International projects should align with Rotary International’s published giving philosophies. Please refer to these guidelines at www.rotary.org.

WHAT WE FUND AND DO NOT FUND

- There are two distinct categories of financial donations that the Madison Rotary Club funds:
 1. **Charitable Grants.** Grants may be given to qualified, non-profit, tax exempt organizations that

meet our stated guidelines for charitable distributions. Grant requests can be made to support a specific project or initiative. We will not provide for general operating support or staffing.

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

- We do not fund: (a) general operating support; (b) organizations that only benefit a few; and (c) 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) of the proposal. Historically, grants from the Madison Rotary Club fall within the \$250-\$1,500 range.
- Recipients will be required to promote and partner with Madison Rotary Club and will articulate their plan as part of the grant application. *See possible examples below:*
 - Create opportunities for Rotarians to Partner with your organization
 - Print publications
 - Websites
 - With organizations memberships
 - Present during a Rotarian lunch and or breakfast meeting how the grant money received from Madison Rotary Club 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 Club Grant/Sponsorship as a line item in your annual report.

- Recipients should make arrangements to have a representative of their organization receive the grant in person at a designated Madison Rotary Club meeting in July. Advanced notification will be given.

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 Club. Other sources of funding for the organization should also be noted, including support from other Rotary clubs.
 - 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.
 - The distribution of funds will normally occur once each year adhering to the schedule outlined below.

Calendar for Charitable Grant Applications

Full application available on the club’s website (see below)	March 1
Application deadline	April 1
Grant review period	April-May
Notification of grants	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
 - Signage with Madison Rotary Club logo
 - Print publications
 - Websites

- o With organizations memberships
 - Present during a Rotarian lunch and or breakfast meeting how the sponsorship money received from Madison Rotary Club provided an impact to your organization.
 - Applicants should make a good faith effort to offer volunteer opportunities to Madison Rotary Club 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 Club Grant/Sponsorship as a line item in your annual report.
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- 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 Club 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 the Club will respond within approximately eight (8) weeks.

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 on line at www.madisonrotarynj.org