



## **Morristown Rotary Club Grant Policy, Guidelines & Grant Application**

### Morristown Rotary Club Grant Policy

Morristown Rotary Club will provide a fair and equitable distribution process of available funds in support of worthy projects that are consistent within its six designated focus areas. The six focus areas are consistent with Rotary International's mission, and are as follows:

1. Peace and conflict prevention/resolution.
2. Disease prevention.
3. Water and sanitation.
4. Maternal and child health.
5. Basic education and literacy.
6. Economic and community development.

Grants may be awarded to fund projects internationally, nationally, statewide, in Morris County or in Morristown.



## Morristown Rotary Club, Grant Guidelines

### 1. Timing and amount of grants

Morristown Rotary will receive grant applications and review them at two periods a year:

- **September 1** deadline for awards announced by end of January, and
- **April 1** deadline for awards announced by end of July.

For **all** grant requests and awards:

- Applying organizations must be a tax-exempt under Section 501(c)3.
- Grant awards will be used within the fiscal year the request was approved.
- Projects will have a specific start and end time.
- All grant requests will require a grant application and a budget project.
- If a grant is funded, a final report on the use of the funds will be required.
- Failure to provide a final report, with required attachments, shall eliminate consideration of any future grant requests.
- If an organization has received a grant award from Morristown Rotary for two years in a row, the organization must wait one Morristown Rotary fiscal year (July 1- June 30) before applying again.
- Please submit with all proposals:
  - Submit with your proposal, preferably condensed into few documents as possible:
    - Indicate the specific uses of the grant.
    - Organization's current Project Expense Budget. List each staff line separately and include percent of time spent on project.
    - Organization's Operating Expense Budget for the current and most recent fiscal year, aligned side by side on the same page.
    - Organization's most recent audited financial statement, if available. This statement should reflect actual expenditures and funds received during your most recent fiscal year.

*(continued)*

- Organization's most recently submitted 990.
  - List of foundation and corporate supporters for the current and most recent fiscal year and any other sources of income, all aligned side by side on the same page.
  - List of foundation, corporations and other income sources that organization is soliciting for funding, and the status of the proposal with each.
  - List of organization's Board of Directors, with member's affiliations.
  - Copy of IRS Determination Letter indicating organization's tax-exempt status.
  - Copy of organization's most recent annual report with audited financial statements.
  - *No more than three* examples of recent articles about, or evaluations of, your organization, if available.
- **If you are submitting a proposal for an award at \$2,500 or greater:**

Prospective grantees must make a grant presentation at each of the three weekly Rotary meetings prior to submitting an application. Locations and times of the weekly meetings are available on the Morristown Rotary Website at [www.morristownrotary.org](http://www.morristownrotary.org) and must be coordinated in advance through Rotary Grants Manager at [grants@morristownrotary.com](mailto:grants@morristownrotary.com)

## **2. Grant Restrictions**

The following items are **NOT** funded by the Morristown Rotary Club:

- General operating costs.
- Grants, scholarships or loans to individual or family requests for scholarships, fellowship assistance or other types of financial support.
- Grants designed to influence legislation.
- Religious based activities for the purpose of furthering religious doctrine.
- Grants for sponsorship of, or travel to, conferences or events.
- Donations to annual campaigns.
- Sponsorship of sports groups.
- Grants to national or statewide umbrella organizations.
- Matching gifts.
- Fundraising activities or advertising sponsorships.
- Administrative, management salaries or indirect fees.
- Receptions and refreshments.
- Expenses incurred before the start of the grant period and projects that do not begin and end within the grant period.



## Morristown Rotary Club, Grant Application

1. Name and Address of Organization:
2. Is organization an IRS 501(c)3 not-for-profit? EIN# \_\_\_\_\_  
Is organization a public agency/unit of government/other? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If other, please explain
3. Name and Title of Individual Making Application:
4. Contact Information: Address, Phone, Email
5. Please answer the following questions:
  - a) What is the amount requested?
  - b) What is the purpose of the requested funds? What is the need and anticipated outcomes?
  - c) Who is the target population of these funds and how will they benefit from them? How will you measure the effectiveness of the project?
  - d) What is the timeline of this project?
  - e) What is the total cost of this project and who are the other funders, if any? A project budget must be included with your application.
  - f) What is the proposed staffing pattern for the project, and the names and titles of the individuals who will implement the project, if applicable?
  - g) Please include a description of your organization, including a brief history, mission and overall need or problem that the organization works to address, the population you serve, including geographic location, socio-economic status, race, ethnicity, gender, sexual orientation, age, physical ability and language.
  - h) How will the organization publicize receipt of the grant award, if awarded, to the community?
  - i) Number of paid full-time staff; number of paid part-time staff; number of volunteers
  - j) Is your organization or organization's work based in Morristown? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If no, does your municipality have a local Rotary Club? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If yes, have you applied to your community's Rotary Club? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If yes, please advise name of local Rotary, if grant was approved, date of any approval and award amount: \_\_\_\_\_

NOTE: If a grant is awarded: at the conclusion of the grant period, a presentation at each of the three Rotary meetings will be required, a final report will also be required along with expenditure receipts, and a short narrative on the outcomes realized as a result of this funding.

Grant requests should be emailed to:  
Rotary Grants Manager at [grants@morristownrotary.com](mailto:grants@morristownrotary.com)



**Morristown Rotary Club, Final Grant Report**

Organization Name:

Organization Address:

Organization Chief Executive Name and Title:

Organization Contact:

Telephone:

Email:

Have there been any changes to your organization's IRS 501(c)3 not-for-profit status since your request for this grant? \_\_\_ Yes \_\_\_ No

If "yes," please explain:

Project name and brief project description:

Check One: \_\_\_\_\_ Project Support \_\_\_\_\_ Other (please specify):

Grant Amount: \$ \_\_\_\_\_ Grant Period From: \_\_\_\_\_ To \_\_\_\_\_

Date of Report: \_\_\_\_\_ Report Due Date: \_\_\_\_\_

Dates covered by this report: From \_\_\_\_\_ To \_\_\_\_\_

Check One: \_\_\_\_\_ This is an interim report

\_\_\_\_\_ This is a final report

**NARRATIVE – Two to five pages**

Please address the following:

A. Please address the following:

- Organizational and/or programmatic achievements and setbacks; significant board and/or staff changes.
- How you measured the effectiveness of your activities; what you learned; and how you used or will use this information.
- The project description and how the project relates to your organization's mission.
- The project's goals and the success you had in meeting them. Have the project's goals been modified in any way? Describe the population served and how that population was affected by the project. How were other stakeholders affected?
- Any problems or changes your organization faced when implementing this project, and how you resolved or attempted to resolve them.
- How you measured the effectiveness of your project; what you learned; and how you used or will use this information. Were there any unexpected results? positive or negative?

NOTE: please send the final report, along with expenditure receipts, to:  
Rotary Grants Manager at grants@morristownrotary.com