Morristown Rotary Club Grant Policy, Guidelines & Grant Application

<u>Morristown Rotary Club Grant Policy</u>

Rotary Club of Morristown provides a fair and equitable grant process of available funds in support of worthy projects that are consistent with Rotary International's six designated focus areas.

The focus areas 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.**

While in support of Rotary International focus areas; the Rotary Club of Morristown has elected to prioritize their local focus areas to:

- **Community Development**
- **Education and Literacy**
- **Family Health**
- **Local Morristown projects, with a start and end date w/in a current fiscal year**
- **New not-for-profit agencies serving the Morristown area**

The Rotary Club of Morristown will consider all grant applications that are aligned with the focus areas listed above.

Revised November 17, 2021

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

- **March 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 project budget.

- 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.

- Any specific project that has been funded twice(whether in consecutive or non-consecutive funding cycles) will not be considered for funding.

- **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 that identifies the expense (s) related to the grant application.**

    - 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.

    - 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 two weekly Rotary meetings prior to applying. Locations and times of the weekly meetings are available on the Morristown Rotary Website at www.morristownrotary.org and must be coordinated in advance through Rotary Grants Manager at grants@morristownrotary.com

2. Grant Restrictions

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

- Administrative, management salaries or indirect fees.

- Expenses incurred before the start of the grant period and projects that do not begin and end within the grant period.

- Grants, scholarships, or loans to individual or family requests for scholarships, fellowship assistance or other types of financial support.

- Grants designed to influence legislation.

- Fundraising activities or advertising sponsorships.

- Religious based activities to furthering religious doctrine.

- Grants for sponsorship of, or travel to, conferences or events.

- Receptions and refreshments.

- Donations to annual campaigns.

- Sponsorship of sports groups.

- Grants to national or statewide umbrella organizations.

- Matching Gifts.

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 the 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) Project budget requirements.
      1. An operating budget for the current and previous fiscal year, aligned side by side on the same page.
      2. A separate project budget which details items/services that Rotary's grant (if funded) will support. The project budget should not be included in the grant narrative. A sample project budget has been provided. See page 6a and page 6b.
      3. If the project is not fully funded, who are the other funders.
      4. If there are no other funders, explain how the project will be funded.

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 Club, if grant was approved, date of approval and award amount:

   _____

   _____.

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

Grant requests should be emailed to:
Rotary Grants Manager at grants@morristownrotary.com

ROTARY CLUB OF MORRISTOWN
EXAMPLE OF PROJECT BUDGET REQUIED FOR GRANT APPLICATIONS

Description Of Project			TOTAL PROJECT COST $5000.
Supply essential products for disadvantaged youth			
ITEM(s)	Quantity	@ $	Total
1. prepaid telephone cards	10	50.00	500.00
2. laptops	2	1,500	3,000.00
3. SAT textbooks	15	25.00	375.00
4. Food only gift cards	25	25.00	625.00
5. Winter coats	10	50.00	500.00
TOTAL Must equal amount requested.	-	-	$5000.00

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ROTARY CLUB OF MORRISTOWN
REQUIRED ATTACHMENT FOR GRANT APPLICATIONS

Description Of Project			TOTAL PROJECT COST $
ITEM(s)	**Quantity**	**@ $**	**Total**
TOTAL Must equal amount requested.	-	-	

<u>Morristown Rotary Club, Final Grant Report</u>

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