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

**Morristown Rotary Club Grant Policy:**

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.

**Morristown Rotary Club Grant Guidelines:**

**1. Timing and amount of grants**

* For the purposes of this grant policy, the Rotary Club of Morristown operates on a fiscal year that runs from July 1 to June 30.

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

* **September 1** deadline for awards to be announced by end of January, and
* **March 1** deadline for awards to be announced by end of July.

• Grant requests administered by the Grants Committee are limited to a maximum of $10,000 per application.

**2. For all grant requests and awards:**

* The Rotary Club of Morristown prioritizes funding for specific, tangible projects rather than general operating expenses. We seek to fund initiatives that enhance an organization's capacity to fulfill its mission through defined projects with measurable outcomes, rather than supporting day-to-day operational costs. Ideal grant requests focus on new equipment, program expansion, specific community initiatives, or other discrete projects that have a clear beginning and end.
* Applying organizations must be a tax-exempt entity under Section 501(c)3.
* Grant awards must be utilized promptly upon receipt. Projects approved in the first cycle (September applications) must be completed within the same Rotary fiscal year (by June 30). Projects approved in the second cycle (March applications) must be completed within six months of the award date, even if this extends into the next fiscal year. In all cases, funds cannot be held in reserve, or implementation significantly delayed beyond these timeframes without the approval of Morristown Rotary Club.
* 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. Final reporting requirements are outlined on pages 10-11 of this document. Final reports should be submitted within 30 days of project completion.
* Failure to provide a final report, with the required attachments, shall eliminate consideration of any future grant requests.
* If an organization has received a grant award from Morristown Rotary for two consecutive Rotary fiscal years (July 1-June 30), the organization must wait one complete Rotary fiscal year 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.

**3. 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**.**

* + - Copy of IRS Determination Letter indicating organization’s tax-exempt status.

* + - 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 the actual expenditures and funds received during your most recent fiscal year.
    - Organization’s most recently submitted 990.
    - List of organization’s Board of Directors, with member’s affiliations.
  + If you are submitting a proposal of $5,000+ please also submit with your proposal:
    - List of foundations, corporations, and other income sources that organization is soliciting for funding, and the status of the proposal with each.
    - Copy of the organization’s most recent annual report with audited financial statements, if available.
    - 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.
    - No more than three examples of recent articles about, or evaluations of, your organization, if available.

**4. If you are submitting a proposal for a grant award at $5,000 or greater:**

Prospective grantees must make a grant presentation at both our weekly lunch and evening meetings prior to applying. Locations and times of our 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)

**5. Grant Restrictions:**

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

* + - * Day-to-day operating costs or regular program expenses that are part of the organization's normal activities rather than specific one-time projects with clear goals and end dates.
      * Administrative expenses, 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 further 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**

**SECTION 1: ORGANIZATION INFORMATION**

1. Name and Address of Organization:
2. Organization Tax Status:
   * Is organization an IRS 501(c)3 not-for-profit?  Yes  No
   * 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. Organization Overview:
   * Number of paid full-time staff:
   * Number of paid part-time staff:
   * Number of volunteers:
   * The year the organization was founded:
6. Has your organization previously received funding from Morristown Rotary Club?  Yes  No

If yes, please list the years and amounts:

1. Please include a description of your organization, including:
   * Brief history
   * Mission statement
   * Overall need or problem that the organization works to address
   * Population you serve, including geographic location, socio-economic status, race, ethnicity, gender, sexual orientation, age, physical ability, and language

**SECTION 2: PROJECT DETAILS**

1. Project Title:
2. Amount Requested: $
3. Project Timeline:
   * Proposed Start Date:
   * Proposed End Date:
   * Key Milestones:
4. Project Description:

a) What is the purpose of the requested funds? What specific need will this project address?

b) What are the anticipated outcomes of this project?

c) Who is the target population of this project and how will they benefit?

d) How will you measure the effectiveness of the project? What specific metrics will you use?

e) What is the proposed staffing pattern for the project, and the names and titles of the individuals who will implement the project, if applicable?

f) How will this project enhance your organization's capacity beyond your day-to-day operations?

g) What is your plan for sustaining the project's impact after the grant period ends?

1. How will the organization publicize receipt of the grant award, if awarded, to the community?

**SECTION 3: BUDGET INFORMATION**

1. Project Budget:

a) Total project cost: $

b) Please attach a separate project budget which details items/services that Rotary's grant will support. (See sample budget and template on pages 8-9)

c) Will this project proceed if Rotary funding is only partially awarded?  Yes  No

d) If the project is not fully funded by Rotary, who are the other funders?

e) If there are no other funders, explain how the project will be completed if full funding is not received.

**SECTION 4: LOCATION INFORMATION**

1. 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:

1. How did you hear about the Morristown Rotary Club Grant Program?  Website  Social Media  Referral  Previous Grant  Other (please specify):

**APPLICATION CHECKLIST**

Please check that you have included the following required documents:

**Required for all applications:**

Completed grant application form  Project budget (using template provided)

Current Project Expense Budget  IRS Determination Letter indicating tax-exempt status

Most recently submitted 990  List of Board of Directors with affiliations

Organization's Operating Budget (current and most recent fiscal year)

Most recent audited financial statement (if available)

**Additional requirements for applications over $5,000:**

List of other funding sources being solicited and status

Most recent annual report with audited financial statements (if available)

List of foundation and corporate supporters (current and previous fiscal year)

Examples of recent articles or evaluations (maximum 3)

**NOTE:**

* A final report along with expenditure receipts and a short narrative on the outcomes realized will be due within 30 days of project completion.
* Applications for awards at $5,000 or greater require presentations at both weekly Rotary meetings prior to submission.

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

|  |  |  |  |
| --- | --- | --- | --- |
| **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 |
| 1. laptops | 2 | 1,500 | 3,000.00  SAMPLE |
| 1. SAT textbooks | 15 | 25.00 | 375.00 |
| 1. Food only gift cards | 25 | 25.00 | 625.00 |
| 1. Winter coats | 10 | 50.00 | 500.00 |
| TOTAL Must equal amount requested. | - | - | $5000.00 |

ROTARY CLUB OF MORRISTOWN

EXAMPLE OF PROJECT BUDGET REQUIRED FOR GRANT APPLICATIONS

ROTARY CLUB OF MORRISTOWN

REQUIRED ATTACHMENT FOR GRANT APPLICATIONS

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

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**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