EDINA ROTARY FOUNDATION
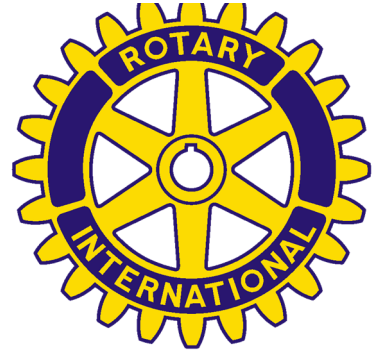# LOCAL GRANTS GUIDELINES
(www.edinarotary.org)

Rotary International

Rotary is a global network of 1.2 million neighbors, friends, leaders, and problem-solvers who see a world where people unite and take action to create lasting change – across the globe, in our communities, and in ourselves. Since 1905, Rotarians have used their passion, energy, and intelligence to take action on sustainable projects. From literacy and peace to water and health, Rotary is always working to better our world, and remains committed to the end. Rotary now has more than 35,000 clubs in over 200 countries!

Rotary Club of Edina

The Rotary Club of Edina was chartered in 1957 and has grown to one of the largest and most successful clubs in Minnesota and the world. Members include over 180 business and community leaders. Each year, the Rotary Club of Edina raises funds to support both our local and international grants program.

Local Grants Program

Each fall, our local grants committee accepts applications for grants of between $1,000-$10,000, with awards being granted in the spring. Most applicants will receive a site visit from a committee member to gather more information about the grant request. The committee then ranks requests based on the following preferred criteria:

- The project takes place primarily in (or the applicant primarily serves people in) Edina, Minneapolis, Hopkins, Minnetonka, Richfield, Bloomington, Eden Prairie, and/or St. Louis Park.
- The funds are for tangible goods, equipment, skill development or training and not for operating funds or consumable items.
- The funds will benefit many versus a few.
- The applicant has a demonstrated need for the funding.
- The Application is supported by an Edina Rotary Club member.
- The project benefits one or more of the following areas of focus:
    - Serving the disabled or disadvantaged;

- Supporting education;
  - Safeguarding basic needs; and
  - Serving youth.
- Rotary is recognized through signage, social media or some other way.
- The applicant is not for profit.
- The committee disfavors applications: a) for an individual person; b) for religious purposes; c) for a major capital fund drive or endowment fund; d) for organizations primarily engaged in lobbying or political activities; e) for basic or applied research: f) to support a general operating budget or to supplement or pay salaries; g) for a special event, a fundraiser or tickets: h) for the benefit of our Rotary club or a member of our Rotary club; and i) for travel.

Signature Project

Nearly every year the Rotary Club of Edina awards a Signature Project. A Signature Project is awarded upon the same criteria specified above for local grants, with the following distinctions:

- The Signature Project will be an award in the range of approximately $10,000-$25,000.
- The Signature Project may involve a multi-year obligation or project.
- There will likely be funding from other sources, perhaps including the Rotary District and other Rotary Clubs.
- There will be a strong (and preferably public) connection to Edina.
- Rotary recognition is strongly encouraged, and the cost of such recognition is included in the project.

These are guidelines to applicants. The Edina Rotary Foundation in its sole discretion reserves the right to deviate from these guidelines and to amend or modify them.

THE EDINA ROTARY FOUNDATION
Grant Application Form
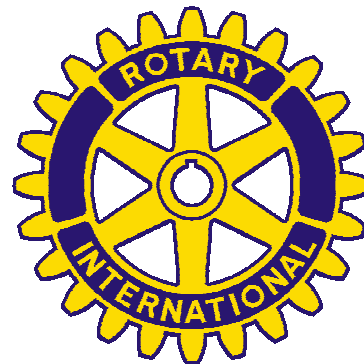
Date of application: _____

Organization Information

Name of organization _____ _Legal name, if different_

Address _____ _City, State, Zip_ _____ _Employer Identification Number (EIN)_

Phone _____ _Fax_ _____ _Web site_

Name of top paid staff _____ _Title_ _____ _Phone_ _____ _E-mail_

Name of contact person regarding this application _____ _Title_ _____ _Phone_ _____ _E-mail_

Is your organization not-for-profit? _____ Yes _____ No

Is your organization a public agency or unit of government? _____ Yes _____ No

Identify any Edina Rotarians supporting your application: _____

How will Rotary be recognized? _____

Proposal Information

Please give a 2-3 sentence summary of request: _____
_____
_____
_____
_____

Population served (type and number): _____

Geographic area served: _____

Project dates (if applicable): _____ Fiscal year end: _____

Budget

Dollar amount requested: $ _____

Total project program cost: $ _____

Total annual organization budget: $ _____

Authorization

Name and title of person submitting request: _____

Signature _____

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Please provide a narrative (five-page limit, including attachments) describing your organization and grant request. Use the following outline as a guide.

I. ORGANIZATION INFORMATION

A. Brief summary of organization history, including the date your organization was established.

B. Brief summary of organization mission and goals.

C. Brief description of organization's current programs or activities, including any service statistics and strengths or accomplishments. Please highlight new or different activities, if any, for your organization.

D. Describe your organization's relationship with other organizations working with similar missions, and what your organization's role is relative to these organizations.

E. Specify the number of board members, full-time and part-time paid staff and volunteers.

II. PURPOSE OF GRANT

A. Need. Describe the overall need or goal. What are the problems that this project will try to solve? What evidence do you have of this need?

B. Purpose. Describe the purpose of this effort. What will this project specifically accomplish? Does the project address the cause of the problem or the consequences?

C. Our Funds. Specifically, how will the Rotary funds be used?

D. Approach. How do you plan to implement this project?

E. Coordination. Who else in your community is working on this particular problem/need? How could/will you coordinate with them to make a bigger impact with this grant?

F. Support. What kind of local support is there for the project? Are people in your community asking for, and supportive of, this effort?

G. Future Needs. Is this a one-time effort, or something that has long term need for action and support? How will this program be financed in the future?

III. EVALUATION

A. Describe your criteria for success. Specifically, what do you want to happen as a result of your activities?

B. How will you measure your results?

C. Who will evaluate the results (staff, board, constituents, community, consultants)?

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IV. ADDITIONAL INFORMATION

A. <u>Volunteers</u>. Provide volunteer information – types of volunteer positions, total number of volunteers, and the volunteer skills and expertise required.

Please name each Rotarian (and their Rotary Club) volunteer, and specify volunteer opportunities for Rotarians.

B. <u>Previous Rotary Funding</u>. Please specify any previous funding (amount and programs supported) from The Edina Rotary Foundation or any other Rotary Clubs within the past 5 years.

C. How will Edina Rotary be recognized (signage, social media, etc.)?

ATTACHMENTS

Please provide the following attachments:

- Project Budget, including income and expenses.

- Additional Project Funders. List names of corporations and foundations from which you are requesting funds, with dollar amounts, indicating which sources are committed and which sources are pending.

- A copy of your current IRS determination letter indicating tax-exempt status.

- For a grant request greater than $2,500 please supply either: 1) Your financial statement from most recently completed year, audited if available, showing a Balance Sheet, an Income Statement, and the organization's budget for current year; or 2) An explanation why any of these items cannot be supplied.

SUBMISSION

All applications are to be received at the following address:

The Edina Rotary Foundation
ATTN: Local Grants Committee
4801 West 50th Street
Edina, MN 55424
Web: www.edinarotary.org

THE EDINA ROTARY FOUNDATION
Grant Application Form

Procedure for Submitting, Evaluating and Granting Requests for Support from Rotary

1. All grant requests must be submitted on The Edina Rotary Foundation Grant Application Form available from our website: www.edinarotary.org. We ask that you be brief and specific with your grant request submission.

2. Grant requests are accepted annually through October 31.

3. All grant requests are reviewed by the committee to determine alignment with the stated guidelines. If your grant request will not be considered for funding, you will be notified by the end of February.

4. If your grant request will be considered for funding, a member of the Local Community Service Committee will contact you directly to request a meeting and visit with your organization and to request additional information (if necessary).

5. Final decisions on grant requests are generally made during March, with the goal of distributing funds the end of March.

6. Grant applications should be mailed to the following address:

    > The Edina Rotary Foundation
    > ATTN: Local Service – Grants Committee
    > 4801 West 50th Street
    > Edina, MN 55424

7. The Edina Rotary Foundation requires a written report from your organization stating the use of the grant proceeds and the success or failure of the grant project. This report is due within one year of receipt of a grant. (If a recipient has not completed this step for past grants, the recipient will be disqualified for future grants until this step is completed.)

The Edina Rotary Foundation reserves the right to deviate from its grant approval guidelines and to amend or modify its guidelines as deemed appropriate in its sole discretion.