



## **South Oldham Rotary Club Foundation Grant Application And Process Information**

Club grants should be used to fund a variety of requests including, but not limited to:

- Humanitarian projects, including service travel
- Financial assistance to worthy organizations located primarily in Oldham and surrounding counties.
- Support for special international projects.

How grants are funded:

- Grants are provided from the South Oldham Rotary Club Foundation. The Foundation is funded by the contributions from the club, from individuals, fund raising events, and activities.
- Individuals and Organizations interested in applying should review our guidelines and then submit a Club Foundation grant application. This application may be obtained by contacting the South Oldham Rotary Club or downloaded from the website- [www.southoldhamrotary.org](http://www.southoldhamrotary.org)
- The South Oldham Rotary Club Foundation uses the following guidelines for the approval of projects requesting charitable donations from the Foundation. The guidelines are applied flexibly and no single guideline will lead to approval or denial of a request.

- 1) Grant applications may be submitted from January 1<sup>st</sup> through February 28<sup>th</sup> and from June 1<sup>st</sup> through July 31<sup>st</sup>. They should be delivered or mailed to the South Oldham Rotary Club, Attention: Foundation Committee Chairperson, Crestwood, KY 40014. The application form is also available on the club's website.
- 2) The South Oldham Foundation Committee members are encouraged to review and process grant applications promptly. The committee should not wait until the end of the application process to review applications.

	<b>Fall Application Jan. 1 – Feb. 28</b>	<b>Summer Application June 1 – July 31</b>
Application review	March-May	August-October
Application submitted to the Board	May	November
Board Review	June	December

Distribution	July	January
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- 3) The South Oldham Rotary Foundation gives strong preference to projects that will benefit groups, organizations and persons living in Oldham and adjoining counties.
- 4) The South Oldham Rotary Foundation favors capital needs or special projects. **Requests to fund general operations will only be accepted from organizations in existence for three years or less unless a special need can be demonstrated for one-time funds that will not be needed in future years.**
- 5) An organization may apply for funding once every 12 months but may receive funding for a maximum of two successive years.
- 6) The South Oldham Rotary Foundation favors a request that will impact many people.
- 7) The South Oldham Rotary Foundation favors projects that will provide assistance to people living in need.
- 8) The South Oldham Rotary Foundation favors projects that will be beneficial to youth, particularly those focusing on education and development.
- 9) The South Oldham Rotary Foundation favors projects and organizations that are supported or recommended by a South Oldham Rotary Club member or members. We urge that a South Oldham Rotary Club member or members be involved as a donor, volunteer or board member.
- 10) Grant recipients must use granted funds for the purposes presented to the Foundation and must account for all funds granted by the South Oldham Rotary Club Foundation. Recipients should be prepared to make presentations to the South Oldham Rotary Foundation Committee members, the South Oldham Rotary Club Board, or the South Oldham Rotary Club. Recipients must return granted funds to the foundation when not used as stated or intended.
- 11) The South Oldham Rotary Foundation will review the project a year or more after funding to monitor the effectiveness of the program. By submitting a grant application the recipient agrees to fully cooperate with the initial inspection and any follow up requests.

## How To Apply

- Applicants must be thoroughly familiar with the guidelines above and then submit a South Oldham Rotary Club Foundation Grant application. An application can be obtained from the South Oldham Rotary Club or by downloading the document from the South Oldham Club website [www.southoldhamrotary.org](http://www.southoldhamrotary.org).

# South Oldham Rotary Foundation Grant Application

To make application, please send the following with your proposal. Applications are accepted from June 1-July 31 and from January 1-February 28.

Please complete this form in the boxes shown below

Send two (2) copies of your completed application *and* attachments to:

**South Oldham Rotary Club Foundation**

**Post Office Box 391**

**Crestwood, KY 40014**

For more information call the contact person listed on our website.

Please attach the following to your application:

- a) The organizations current financial state
- b) The project budget

Please have the following documentation available for review upon request:

- c) Current List of Board Of Directors
- d) 501 (C) (3) Documentation from the IRS
- e) Brochure or Annual Report for the Organization
- f) Relevant quotes and specifications related to your project

Put the applicable information in the space provided.

Name of Organization:	
Amount Requested:	
Items to be Purchased:	
Describe Who and How Many Will Benefit:	
Contact Person and Title:	

Project Director	
Organization Address:	
City, St, Zip:	
Phone, Fax:	
Email:	
Web Address:	
Tax ID Number:	

We agree that this application fairly and honestly represents the needs, governance, and finances of the charitable organization we lead.

Executive Director (Signature)	Chairman of the Board (Signature)	Date
_____	_____	_____
Endorsing Rotarian(s)	Rotarian's Role in organization (i.e. Donor, board, volunteer)	
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____



H, Is this grant to fully fund the project, a match or a partial grant?

I, Is someone from your organization a member of the South Oldham Rotary Club?
