

# MISSION STATEMENT, GRANT APPLICATION AND GUIDELINES SOUTHERN PINES ROTARY CLUB CHARITABLE FOUNDATION (SPRCF)

## MISSION STATEMENT

Our philanthropic mission is to improve the lives of all persons in the world. We will do this by partnering with organizations that do one (or more) of the following:

- Improve the economic well-being of individuals and society overall.
- Provide basic needs for those in our community such as shelter, food, clothing and safety.
- Enhance the arts and ensure education and literacy opportunities for those of all ages.
- Provide healthcare resources to those in need.
- Provide disaster relief, clean water, sanitation and hygiene.
- Grant scholarships to individuals for post-secondary education.
- Provide primary and matching funds for projects that embody the ideals and mission of Rotary International and the Rotary Foundation.

## GRANT GUIDELINES

### Types of Grants:

The Foundation currently manages two categories of funds:

1. The **Permanent Endowment** is composed of unrestricted funds that have been donated to the Foundation over time. A percentage of the Permanent Endowment is allocated each calendar (fiscal) year to grants known as "**Endowment Grants**". Funds not allocated in a given year may be "rolled over" to the succeeding year or may be added back to the Permanent Endowment in the discretion of the Foundation Board. The recipients of Endowment Grants must be approved by the Foundation.
2. **Fundraiser Net Proceeds** come to the Foundation from fundraising activities of the Foundation and the Southern Pines Rotary Club. The Joint Fundraising Committee will identify projects and causes pursuant to an Agreement between the Club and Foundation. These grants are known as "**Fundraising Grants**". Fundraising Grants may be allocated to local, national or international entities. The recipients of Fundraising Grants must be approved by the Southern Pines Rotary Club and the Foundation.

Pursuant to the SPRCF Articles of Incorporation and Bylaws and IRS statutes and regulations, the Foundation can only give Fundraising and Endowment Grants to nonprofit organizations that are qualified as tax exempt under Section 501 (c) (3) of the Internal Revenue Code.

### Endowment Grants:

The SPRCF will **not** give Endowment Grants (except as noted) for the following:

1. Nonprofit organizations that are not qualified as tax exempt organizations under Section 501 (c) (3) of the Internal Revenue Code;
2. Organizations who primarily serve populations located outside Moore County, except for projects that embody the ideals and mission of Rotary International and the Rotary Foundation;
3. Individuals even if the individuals are actively involved in a charitable project or cause;

4. Businesses, firms or other similar entities who are not Section 501 (c) (3) entities even if the funds are used to support a charitable project or cause;
5. Lobbying groups and political parties or groups primarily supporting a political cause;
6. Sabbatical leaves or scholarly research;
7. Religious organizations and churches unless the organization or church is sponsoring a specific project that meet these Foundation Grant Guidelines;
8. Tax supported governmental agencies, but will consider special projects for public and private schools that meet these Foundation Grant Guidelines; and
9. Travel, tours and trips.

The fiscal year of the Foundation begins January 1 and ends December 31. The Foundation will not approve more than 60% of the funding available for Endowment Grants in a given year before July 1. This requirement may be waived by the affirmative vote of three-fourths of the directors present and voting at a duly called Board meeting.

Endowment Grants are primarily used to fund capital expenditures or specific projects that assist the SPRCF in realizing its mission. The Foundation will not fund a capital expenditure for improvements to real property unless the requesting organization has a fee simple interest in the real property. The Foundation will use the Priorities identified in these Guidelines when deciding to fund a specific project. The usual Endowment Grant is in the range of \$500.00 to \$2,500.00, but other amounts may be considered. The Board may attach conditions to the approval of any capital expenditure or project request.

Normally, grants for administrative or on-going operating expenses will not be considered, however the Board may consider such grants in honor or in memory of Southern Pines Rotarians and their family members or at the conclusion of the Foundation fiscal year if other potential grants meeting these guidelines have not been identified. No application will be required for these grants.

An organization who receives a grant may not receive a grant the following year (for example, if a grant is approved in 2021, the organization must wait until 2023 to apply for another grant). This requirement may be waived by the affirmative vote of three-fourths of the directors present and voting at a duly called Board meeting. Grants may be paid out in installments over a two year period, but no longer.

An organization seeking an Endowment Grant must file a grant application on a form approved by the Board. The person or persons signing the grant application on behalf of the requesting organization represent that he, she or they have the authority to apply for the grant on behalf of the requesting organization.

A copy of our Foundation Mission and these Grant Guidelines will be given to each organization that applies for a grant. The Grant Application will contain an acknowledgement that the requesting organization has received a copy of our Mission and Grant Guidelines.

All applications should demonstrate that the requesting organization has the ability to efficiently and effectively use the funds and/or matching funds to positively impact the community and that the management, board of directors and/or volunteers have the capacity to achieve the proposed outcome.

If the requesting organization is aware of a conflict of interest, the grant application must disclose any relationships that might be considered a conflict of interest between the requesting organization, its Board of Directors, its management and the SPRCF. The SPRCF will also attempt to identify any conflicts of interest.

Once the grant is approved, the funds will be paid directly to the approved entity. The requesting organization will cooperate with the SPRCF to ensure that the funds are correctly spent and applied to the project as stated in the grant application. Any other use of the funds other than as specified in the grant is prohibited and may result in a request for the funds to be returned to the SPRCF.

Although one of the mission statements of the SPRCF is to approve post-secondary educational scholarships, the foundation is not currently accepting applications for scholarships except for those individuals recommended by the Southern Pines Rotary Club. Scholarships shall not be paid directly to the individual recipient, but directly to the school for credit to the recipient's account.

Priorities. As a guide for determining the approval of Endowment Grant projects, the Foundation may consider the following:

- Demonstration of Value. Application documents or demonstrates that the overall value of the project to the community is high.
- Community need for the project.
- Clear, tangible outcomes. Objective and outcomes for the project are clear and measurable or tangible.
- The project has a clear fit with the mission of the Foundation.
- Timeliness. The proposal shows that the investment is timely. The scope and schedule are reasonable.
- Organizational credibility. The organization has credibility for this kind of project (name recognition, a history or track record of achievement, a mission that is related to the project goal)
- Leveraged contributions. There is a potential for the foundation contribution to be leveraged or matched (matching funds, in-kind contributions, in-kind equipment or office space)
- Innovation/Creativity. The concept is innovative and does not duplicate other projects in the community. The project is a jumpstart for a new effort.
- Encourages Rotarian participation.
- Raises community visibility of Rotary.

### **Fundraising Grants:**

Requests for funding and educational scholarships originated by the joint Fundraising Committee of the Southern Pines Rotary Club and SPRCF may be approved without a written grant application, but do have to be approved by the SPRCF Board before funding. Further information may be requested from the Committee if the purpose or uses of the grant are unclear.

**This Application should be delivered to: Steve Gaydica at [jsgaydica7@nc.rr.com](mailto:jsgaydica7@nc.rr.com), phone: 910 692-8798 (home) or 910 639-1537 (cell)**

### **ENDOWMENT GRANT APPLICATION FORM SOUTHERN PINES ROTARY CLUB CHARITABLE FOUNDATION, INC. (SPRCF)**

Name of Organization and Federal Tax ID Number:

Mailing Address:

Business Address (if different):

Contact person including name, title, phone and email address:

Is your organization qualified as a charitable 501 (c) (3) tax exempt organization? If not, what type of organization is it? Please provide a copy of your organization's IRS Determination Letter.

Describe the mission of your Organization, the population served, how long you have existed and any additional information you may wish to provide. If you have a web site, please provide a link.

State the total amount needed for the project, how much you are requesting from the SPRCF and what portion is already or needs to be funded if a matching amount is approved by the SPRCF:

Describe the project including the start and finish dates, a statement of the project's goals and the population to be served. Is this project on-going or a one-time opportunity? How does your project respond to our Mission Statement? Will Rotary Club members be needed as volunteers?

Please provide a projected budget and identify any other sources of funding being sought. If the request is for a capital expenditure, please provide quotes.

Describe how the program or project is to be evaluated and the expected outcome.

Describe how your organization will promote the Southern Pines Rotary Club and Foundation as a supporter of the project.

Do you agree to submit a written report and/or make a presentation to the Southern Pines Rotary Club, if requested?

On an attachment, list your Officers, Board of Directors and executive staff members. This will help us identify any conflicts of interest between your organization and our club members. If you are aware, are any of those individuals listed on the attachment members of the Southern Pines Rotary Club?

The undersigned acknowledges receipt of the Southern Pines Rotary Club Charitable Foundation Mission Statement and Grant Guidelines and agrees to abide by the terms of the Grant Guidelines.

\_\_\_\_\_  
Executive Director or President

Date: \_\_\_\_\_

Date received by SPRCF: \_\_\_\_\_