

Rotary Information Session: Applying to Rotary Charities

Jan 25, 26, 2007



Welcome and Introductions

- Marsha Smith, Executive Director
- Beth Buelow, Program Officer
- Howard King, Volunteer Coordinator
- Stacey Foster, Administrative Assistant

Today's Agenda

- The Rotary Charities Alignment Process
- Updates in Detail
 - Capital
 - Program
 - Organizational Capacity Building
 - Planning
- Applying Online
- Ten Tips for a Stronger Application
- Suggested Resources
- Questions

Rotary Charities Alignment

- Goals
- Activities Funded/Criteria
- Application Form & Process
- Review Process
- Reporting/Evaluation

Funding From Rotary

- How many of you have received funding from Rotary Charities?
- How many of you have received funding from the Rotary Good Works Fund?
- Who is considering an application for March 1?

Some Context

- Deadline: March 1, 2007
- Types of Proposals Accepted:
 - Capital (up to \$99,000)
 - Program (up to \$99,000)
 - Organizational Capacity Building (up to \$50,000)
- Amount available for grants: \$400,000
- Award Notification: Early June
- Planning Grants accepted monthly; up to \$5,000

Updates to: Capital Grants



■ Goals

- Encourage philanthropy and ensure a large base of community support by providing challenge grants whenever possible.
- Leverage state and national resources for community projects by providing local matching funds.

Updates to: Capital Grants



■ Activities Funded/Criteria

- Renovation, expansion or construction of needed community facilities or acquisition of property for public use
- Awards range from \$5,000 to \$100,000+
- Support a wide range of the community
- Be accessible to many people and designed for community use
- Serve more than one organization (whenever possible)
- Be cost-effective
- Be responsive to current and future community needs
- Be operationally sustainable

Updates to: Capital Grants



■ Application Form & Process

- Online Application
- Meeting with RC staff highly recommended for requests of less than \$100,000; meeting is required for requests of more than \$100,000
- Capital-Specific Revisions to Common Grant Application Form

Updates to: Capital Grants



■ Review Process

- Deadline for **Capital** proposals requesting \$100,000 or more: September 1
 - Initial screening and notification by: September 30
 - Site visits and interviews for selected applicants completed by: November 30 [staff and board review only]
 - Grant decisions and notifications no later than: December 15
- Deadline for **Capital** proposals requesting less than \$100,000: March 1
 - Initial screening and notification by: March 31
 - Site visits and interviews for selected applicants completed by: May 31 [involves volunteer Rotarians]
 - Grant decisions and notifications no later than: June 15

Updates to: Capital Grants



- If Funding is Awarded
 - Grant Agreement Letter
 - Reporting/Evaluation

- Q&A

Updates to: Program Grants



- **Goals**
 - Encourage new approaches that better serve citizens
 - Encourage efficiency and effectiveness
 - Encourage sharing of resources and leveraging of assets through collaboration

Updates to: Program Grants



■ Activities Funded/Criteria

- Programs that promote innovative, grass-roots approaches to community issues
- Awards range from \$5,000 to \$99,000.
- Be based on identified community needs
- Have measurable outcomes
- Demonstrate high impact
- Be innovative
- Preference will be given to proposals that are collaborative
- Primary focus will be on funding new initiatives or the expansion of programs and services. Funding to support continuation of fully developed existing programs will not be considered.

Updates to: Program Grants



■ Application Form & Process

- Online Application
- Meeting with RC staff highly recommended
- Program-Specific Revisions to Common Grant Application Form

■ Review Process

- Deadline for all **Program** proposals: March 1
 - Initial screening and notification by: March 31
 - Site visits and interviews for selected applicants completed by: May 31 [involves volunteer Rotarians]
 - Grant decisions and notifications no later than: June 15

Updates to: Program Grants



■ If Funding is Awarded

- Grant Agreement Letter
 - Applicants who receive funding in the Program category will work directly with Rotary Charities staff to develop the grant agreement letter prior to the awarding of funds.
- Reporting/Evaluation

■ Q&A

Updates to: Organizational Capacity Building



■ Goal

- To support a variety of efforts to ensure the sustainability of an efficient and effective nonprofit system

Updates to: Organizational Capacity Building



■ Activities funded

- Organizational development activities
- New staff positions that are critical to building organizational, financial or leadership capacity
- Collaboration, partnership or merger activities
- Recommended strategies as they relate to building organizational capacity, effectiveness or efficiency

Updates to: Organizational Capacity Building



■ Criteria

- Organization must have conducted a strategic planning process and/or an organizational assessment within the last two years that involved full participation of the board and staff.
- Awards range from \$5,001 to a maximum of \$50,000.
- If needed, a funding plan for up to three years will be considered. Funding will be decided on a yearly basis; applicants must submit an application for each funding year requested.
- Rotary Charities will provide:
 - up to 75% of the total cash required to complete year one of the project; grant amount not to exceed \$50,000
 - up to 50% of the total cash required to complete year two of the project; grant amount not to exceed \$35,000
 - up to 25% of the total cash required to complete year three of the project; grant amount not to exceed \$25,000.

Organizational Capacity Grant Amounts EXAMPLE

	RC % Maximum	Total Project Cost	Rotary \$ Maximum	Organization Contribution
Year 1	Up to 75% of total cost	\$66,666	\$50,000	\$16,666
Year 2	Up to 50%	\$70,000	\$35,000	\$35,000
Year 3	Up to 25%	\$100,000	\$25,000	\$75,000

Updates to: Organizational Capacity Building



■ Application Form & Process

- Online Application
- Meeting with RC staff is required
- Capacity-Specific Revisions to the Narrative Form

■ Review Process

- Deadline for all **Organizational Capacity** proposals: March 1
 - Initial screening and notification by: March 31
 - Site visits and interviews for selected applicants completed by: May 31 [involves volunteer Rotarians]
 - Grant decisions and notifications no later than: June 15

Updates to: Organizational Capacity Building



■ If Funding is Awarded

- Applicants who receive funding in the Organizational Capacity Building grant category will work directly with Rotary Charities staff to develop the grant agreement letter prior to the awarding of funds.
- Reporting/Evaluation

■ Q&A

New Grant Category: Planning Grants



■ Goal

- To assist nonprofits develop successful strategies for capacity building, programs and capital projects

■ Activities Funded/Criteria

- capacity building activities such as strategic planning, organizational assessment and action planning
- program research or planning,
- or capital project feasibility or planning
- Awards range from \$500 to \$5,000
- Applications are accepted on the first of each month
- Minimum 25% cash match required

■ Application Form & Process

- Online Application
- Phone call or meeting with RC staff is highly recommended
- Planning Grant Narrative Application Form

New Grant Category: Planning Grants



■ **Review Process**

- RC Staff review; RC Board vote
- applicants notified generally within 45 days of receipt

■ **If Funding is Awarded**

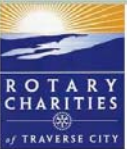
- Reporting/Evaluation

■ **Q&A**

Electronic Submissions



- Submit electronically by web:
www.rotarycharities.org
- Easy to use
- Save your work through “bookmarks” or “favorites”
- Print your work as you go
- Staff available for technical assistance
- Feedback welcome!


PROGRAM Grant Application Form
Back Next

Common Grant Application Form - Part 1 of 3


Date of Application:
 Legal name of organization applying:
(Should be same as on IRS determination letter and as reported on IRS Form 990.)
 Year Founded: Current Operating Budget \$
 Executive Director: Phone number:
 Contact person (if different from executive director):
 Name: Title: Phone:
 Address:
 City/State/Zip:
 Fax Number: E-mail Address:
 Website URL:
 List any previous support from this funder in the last 5 years:

 Project Name:
 Purpose of Grant (0 of 50 words)

 Project Dates:
 Amount Requested \$
 Total Project Cost \$
 Geographic Areas Served: Arden Berde Grand Traverse Ionia Leelanau

Save Application Printable Version
Back Next

Rotary Charities Page 1 of 1


PROGRAM Grant Application Form
Back Next

Common Grant Application Form - Part 3 of 3

Attachments for Governmental Agencies or School Districts Only
(Skip if you are a Nonprofit Organization)
If you do not have a required attachment in electronic form, please skip that field; however, the attachment is still required to be sent along with your hard-copy application.

1. Trustee/Board Officials
 No file attached (10MB Max) Browse Attach

2. Summary of the current operating budget
 No file attached (10MB Max) Browse Attach

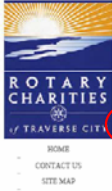
3. Most recent independent audit
 No file attached (10MB Max) Browse Attach

4. If Applicable: Memorandums of Understanding, Letters of intent and other indications of collaboration from all participating entities. (General Letters of Support are not accepted). Please provide contact information, including e-mail addresses, for each entity.
 No file attached (10MB Max) Browse Attach

5. Copy of the minutes of the meeting or board resolution that authorized this grant application.
 No file attached (10MB Max) Browse Attach

Resume Later
Back Next

Rotary Charities Page 1 of 3



PROGRAM Grant Application Form

[Back](#) [Next](#)

Narrative - Part 2 of 4

2. Purpose of Grant

2.1 Statement of Need
 Describe the community needs/problems to be addressed, how the needs were determined, description of target populations, the studies, research or needs assessments as applicable.
 (250 of 250 words)

The necessity is best realized in his decision, at the age of 42, to turn over his very successful printing business to concentrate on science. As he wrote his mother of the decision, he said "I would rather have I said 'I love my family, than 'I love my job'." And for the second half of his life he has been focused on that, focusing on improving the world at large other than his own.

Even in the field of science, his view was focused on putting his work to "useful" ends. Franklin believed that knowledge—especially science—should not be pursued for pure fascination but then for practical effect.

This life is a testament to this belief. For instance, shortly after discovering electricity, Franklin pondered if a small practical use it could be after giving it some thought, he figured it was best to leave that question for others. Upon further reflection, however, he created the lightning rod—a

2.2 Project Overview

a. Description of Input/Outcomes
 (100 of 200 words)

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b. Project Goals
 (5 of 200 words)

c. Action Plans
 (5 of 500 words)

<http://www.rotarycharities.org/application.php> 1/27/2006

Rotary Charities Page 1 of 2



PROGRAM Grant Application Form

[Back](#) [Next](#)

Budget - Part 1 of 4

Name of the organization: Contact Person:

Fiscal year end date:

Program title: Total Program Cost:

Total amount requested from Rotary Charities:

Program Start and end date:

5.1 Program Budget Form

Program Income	Anticipated	Committed	Total
Contributed Income			
Local Government	0	0	30
State Government	0	0	30
Federal Government	0	0	30
Rotary Charities (Itemize Below)	20000	0	\$20000
Other Foundations*	40000	10000	\$50000
Corporations*	8000	0	\$8000
Board/Individual Contributions	0	8000	\$8000
Fundraising events*	0	0	30
Other*	0	0	30
Earned Income			
Client Fees	0	0	30
Membership Dues	1000	1500	\$2500
Concessions/Sales*	0	0	30
Publications and Products	2500	0	\$2500
Ticket Sales	0	0	30
Other*	0	0	30
Other Income			
Funds allocated through Organization's Budget*	0	2000	\$2000
Contributions from partners*	0	2000	\$2000
Total Cash Income	\$78500	\$21900	\$100400
In-kind Contributions*	0	0	30
Total Program Income	\$78500	\$21900	\$100400
Program Expenses			
Personal Expenses			
Salaries and Wages*	1000	8000	\$10000
Fringe Benefits	0	1000	\$1000
Non-Personal Expenses			
Contract Services/Professional Fees*	15000	0	\$15000
Office Space	0	8000	\$8000
Equipment/Supplies	8000	2500	\$10500
Staff/Board Development	0	1500	\$1500
Travel/Related Expenses	0	10000	\$10000
Other*	0	80000	\$80000
Total Program Expenses	\$28000	\$73000	\$101000
Excess (Deficiency)*	\$33500	(\$15000)	\$18500

* please list or explain in narrative

<http://www.rotarycharities.org/application.php> 1/27/2006

Application Attachments



■ For all applicants:

- **Nonprofit Organizations**
 - Current IRS determination letter
 - Board of Directors list with affiliations.
 - Financial Information
 - Organization's current annual operating budget, including expenses and revenue
 - Most recent independent audited statement or review
 - Most recent IRS Form 990
 - Current percentage of gross revenue that is administrative and fundraising expenses.
 - Copy of current license from the Michigan State Attorney General or statement why your organization is exempt from required filing.
 - If Applicable: Memorandums of Understanding, Letters of Intent and other indications of collaboration from all participating entities. (General Letters of Support are not accepted).
 - Annual report, if available.
- **Governmental Agencies or School Districts**
 - List of elected officials
 - Summary of the current operating budget
 - Most recent independent audit
 - If Applicable: Memorandums of Understanding, Letters of Intent and other indications of collaboration from all participating entities. (General Letters of Support are not accepted). Please provide contact information, including e-mail addresses, for each entity.
 - Copy of the minutes of the meeting or board resolution that authorized this grant application.

Ten Tips for a Stronger Application

1. Do not change or create programs solely for funding purposes.
2. Do not make assumptions about the reviewers' prior knowledge or understanding:
 - Use statistics to support the existence of community need
 - Make a clear connection between the issue and your organization
 - Avoid industry lingo, highly technical terms and acronyms whenever possible
3. Begin work on your proposal early.
4. Be clear, concise and compelling.
5. Be as specific as possible in your budget narrative.
6. Present realistic, practical goals and measurable outcomes, not pie-in-the-sky numbers.
7. Demonstrate that additional funding partners have committed to your project.
8. Have a thoughtful answer to "how will this be sustained after the grant period?"
9. Create a PLAN, not just a proposal.
10. Thoroughly read the guidelines before contacting us with questions; it will make our conversation more productive and efficient.

A Few Resources

- NorthSky Nonprofit Network
- Foundation Center Library-TADL
- www.foundationcenter.org
- www.managementhelp.org [click on "Fundraising(nonprofit)"]

In Conclusion...

Spring Cycle Deadline for Capital and Program Grants less than \$100,000 + Capacity Grants of up to \$50,000: **March 1, 2007**

For more details about information presented today: www.rotarycharities.org

Applications & Guidelines available now:
www.rotarycharities.org

Questions ?

For More Information

Contact the Rotary Charities Staff:

Marsha Smith, Executive Director

Beth Buelow, Program Officer

Howard King, Volunteer Coordinator

Stacey Foster, Executive Assistant

(231) 941.4010

www.rotarycharities.org

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