



Rotary Club of Monterey Pacific
Post Office Box 2215
Monterey, California 93942
www.montereypacificrotary.org

ORGANIZATION GUIDELINES FOR LOCAL FUNDING REQUESTS

Geographic Limits and Types of Grants:

The Rotary Club of Monterey Pacific seeks to support, in a limited way, 501(c) 3 organizations with a demonstrated ability to provide meaningful and measurable ongoing benefits to the residents of Monterey County through all or some of the following objectives:

- Improve the well-being of young people
- Strengthen the family
- Improve the quality of life through cultural activities
- Encourage more humane treatment of animals
- Encourage and promote literacy
- Alleviate hunger

501 (c) 3 organizations providing services or programs in Monterey County are eligible to submit requests for funding from the club. The club will not consider funding, through its local grants, for any program or project that occurs outside of its geographic limitations.

Funding will be considered in the following local areas:

- Community Services – Children, Youth, Senior Citizens & Families
- Animal Welfare
- Arts & Culture programs
- Health care issues focusing on prevention
- Hunger needs
- Community Environmental Issues

Organizations seeking funding should have

- A broad base of support
- Management capacity to effectively execute the project
- A clear, concise plan for project evaluation with outcome measurement
- Collaboration among other service providers

What we do not fund

- Organizations without a 501 (c) 3 status, except for schools and public agencies
- Religious or political organizations
- Organizations who discriminate on the basis of age, race, gender, sexual orientation, religious, or political affiliation
- Individuals

Grant Making Procedures and Information Required

Multi-year support will not be considered.

Quite often, a grant from the club will be issued as a matching challenge. Your organization should be prepared to match such gift, if required.

There is no formal application to complete. The requesting organization should submit a letter, not to exceed five typewritten pages (handwritten letters will not be accepted). The minimum requirements to include in the letter are:

- Official name of the organization as listed with the IRS, including Federal Tax Identification number
- The organization's history and mission
- Contact information. Who to call in case of questions.
- The need(s) or problem(s) your organization works to address
- The amount you are requesting
- Other funding sources where you are seeking support or have received support
- Current programs and accomplishments (give particular emphasis to achievements during the past 12 months)
- The population your agency serves including geographical location, socio-economic status, race, ethnicity, gender, sexual orientation, age, physical ability and language.
- Number of paid full-time staff, number of paid part-time staff, number of volunteers
- Your organization's relationships, if any, with other organizations working to meet the same needs or providing similar services. Explain how your agency differs from these other agencies.

Discuss the program for which you seek funding and give specifics regarding how any funds received would be used.

1. If your request is for a specific project, explain the project, including:
 - a. A statement of the project's primary purpose and the need or problem you are trying to address
 - b. The population you plan to serve and how this population will benefit from the project
 - c. The anticipated length of the project
 - d. How the project contributes to your organization's overall mission
 - e. A budget for the project, showing expected income and sources
2. If applying for general operating support, briefly describe how the funds would be used.

EVALUATION

Explain how you will measure the effectiveness of your activities. Describe your criteria for a successful program and the results you expect to achieve.

FINANCIAL STATEMENTS

Submit a Statement of Financial Position (Balance Sheet) and Statement of Activities (Income Statement) used as the basis for filing your most recent IRS Form 990.

REQUEST REVIEW PROCESS

After a letter of request is received, the club's Allocation Committee will review it. As a result of the initial review, a request for additional information from the organization may be required. The Allocations Committee will submit a status report to the Club's board of directors with recommendation or denial of funding. The decision by the board of directors is final.

RESPONSIBILITY OF GRANT RECIPIENTS

If funding is approved by the board of directors, a grant agreement outlining the terms and conditions of the grant must be signed by an authorized management official of the organization and returned to the club.

The funds received by an organization **MUST** be used for the purpose stated in the grant agreement. If funds cannot be used for the stated purpose and the organization wishes to use the funds for another purpose, permission must be requested, in writing, to the Allocations Committee who will, in turn, make its recommendation to the club's board of directors. Otherwise, the funds must be returned to the club.

A final evaluation from the organization must be submitted no later than 1 year following the receipt of the grant. Future grant requests will not be considered unless previously required evaluations have been received.

DEADLINE AND SUBMISSION

Submissions are accepted by mail only. All grant requests should be mailed to:

**The Rotary Club of Monterey Pacific
Attn: Allocations Committee
Post Office Box 2215
Monterey, California 93942**

ALL REQUESTS FOR FUNDING MUST BE POSTMARKED NO LATER THAN MARCH 1, 2010. No Exceptions.

The decision on funding will be made by the Board of Directors at its May 2010 meeting.

Any inquiries prior to submission of a grant should be directed to the Chairman of the Allocations Committee: Jim Bennett, jn.bennett@comcast.net