



## Grant Application

Please complete this form by typing in answers in the boxes shown below. Text box size is limited.

**Send your completed application and attachments, in PDF format on a (MS Windows) flash drive, to:** Rotary Club of Tulsa Foundation Grants, 616 S. Boston Ave., Suite 410, Tulsa OK 74119. For more information call (918) 584-7642.

Please include the following required documents:

- a) Most recent fiscal year-end financial statement
- b) Current year budget & year-to-date financial statement
- c) Most recent audit (see Page 2 Item L)
- d) Most recent IRS Form 990 (see Page 2 Item L)
- e) Current Board of Directors list
- f) 501(c)(3) documentation from the IRS
- g) Brochure or Annual Report for the organization
- h) Equipment quotes and specifications for your request

**Grant Request Deadlines**  
 Applications are accepted from Aug. 1 – Aug 31.  
 Approved grants are paid once a year.

**Date of this Application:**

Name of Organization	
Amount Requested	
Items to be Purchased	
Briefly Describe Who and How Many Will Benefit. Explain fully on next page	
Contact, Title & Email	
Executive Director & Email	
Board Chair	
Organization Address	
City, State, Zip	
Primary Phone	
Alternate Phone	
Website	
Tax ID Number	

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

\_\_\_\_\_  
 Applicant Contact & Title (please print)

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Executive Director or Board Chair

\_\_\_\_\_  
 Date

\_\_\_\_\_  
 Endorsing Rotarian (Recommended)

\_\_\_\_\_  
 Role (e.g., Donor, Board Member, Volunteer)

\_\_\_\_\_ (Please print name. Rotarians signature is optional with their assent)

**Please respond to each of the following questions.**  
**Text box size is limited. Please use additional pages if necessary to fully provide any answer & reference the appropriate item letter.**

A. Please describe the mission of your organization, the year and reason you were founded.

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B. What services do you provide to the community? How many people are helped yearly?

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C. Does your organization benefit youth? If so, how many and in what ways?

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D. Will this donation benefit persons living in Tulsa or adjoining counties? Explain.

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E. What other sources of funds or matches are you soliciting for this project?

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F. Do you receive funds from the United Way? If so, list amounts for the past 3 years.

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G. What amounts on your financial statements are 'Restricted', for what purpose and for how long?

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H. Do your financial statements reflect "Beneficial Interest in Assets Held by Others" such as the Tulsa Community Foundation? If yes, list with whom and amounts.

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I. Does the organization receive benefits from any endowment, trust, corporation, fund or other financial assistance not listed on your financial statements? If yes, describe in detail.

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J. List the dates and dollar amounts for any grants received in the past 5 years from the Rotary Club of Tulsa Foundation.

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K. Has anyone affiliated with your organization completed the Oklahoma Center for Nonprofits "Standards for Excellence" program? Please list names & title.

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L. Does your organization have an annual audit & file IRS Form 990? If YES, include the most recent copy. If NO, please state reasons.

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**NOTE:** *You may submit a different set of current financial documents instead of the financial form following this page if you prefer. Audited or CPA prepared statements are given preference.*

# Current Financial Statement

Balance Sheet as of:

<u>Current Assets</u>	<u>Amount (whole \$)</u>	<u>Description if needed</u>
Cash & cash equivalents		
Accounts & pledges receivable		
Investments		
Inventory		
Loans and notes receivable		
Prepaid insurance & expenses		
Beneficial assets held by others		
Other current assets		
<b>Total Current Assets...</b>		

<u>Fixed Assets</u>	<u>Amount</u>	<u>Description if needed</u>
Land		
Buildings		
Machinery and equipment (Less Accumulated Depreciation)		
Deferred charges		
Other fixed assets		
<b>Total Fixed Assets...</b>		
<b>Total Assets</b>		

<u>Current Liabilities</u>	<u>Amount</u>	<u>Description if needed</u>
Accounts payable		
Notes payable		
Payroll & other accrued expenses		
Current portion of long-term debt		
Deferred or unearned income		
Other current liabilities		
<b>Total Current Liabilities...</b>		

<u>Long-Term Liabilities</u>	<u>Amount</u>	<u>Description</u>
Mortgages payable		
Other long-term debt		
Capital lease obligations		
Other long-term liabilities		
<b>Total Long-Term Liabilities...</b>		

<u>Net Assets</u>	<u>Amount</u>	<u>Description</u>
With Donor Restrictions		
Without Donor Restrictions		
Current Net Income		
<b>Total Net Assets...</b>		
<b>Total Liabilities &amp; Net Asset</b>		

<u>Annual Income from Fundraising Activities (explain)</u>	<u>Amount</u>	<u>Description</u>