



## GRANT GUIDELINES

Rotary Club of Tulsa Foundation, Inc. (the “Foundation”) uses the following Grant Guidelines (“Guidelines”) for the approval of projects requesting charitable donations. The Foundation applies these Guidelines flexibly; no single Guideline is outcome-determinative.

1. Grant applications will be received from August 1 through August 31. The application form and all attachments should be furnished on a single (Microsoft Windows) flash drive to the Club office, 616 South Boston Avenue, Suite 410, Tulsa, Oklahoma 74119 and must be received by August 31<sup>st</sup> or the first business day following. Applicants should expect the review process to follow the schedule below, although delays may occur:

<b>PROCESSING</b>	
Application Review	<b>September – October</b>
Board submission	<b>October</b>
Foundation review	<b>November</b>
Grant Distribution	<b>December</b>

2. The Foundation gives strong preference to projects that will benefit persons living in Tulsa and adjoining counties.
3. The Foundation supports one-time capital expenses that directly enhance a nonprofit organization’s ability to serve its clients and achieve its mission. Grants may be used for such purposes as facility improvements, vehicle purchase and maintenance, equipment purchases, and other non-expendable assets. The Foundation targets this assistance to nonprofits that would otherwise find it difficult, if not impossible, to fund such one-time capital expenses through their operating budgets. Requests for expenses that would be considered routine or normal operating expenses will not be considered.
4. The Foundation offers grants for capital needs from \$10,000 up to \$20,000 (although smaller requests will be considered), subject to review by the Grants Committee (“Committee”), the Club Board of Directors, and the Foundation Trustees (“Trustees”). Applications must include vendor quotes for all equipment. Grant funds are limited and approved requests may be modified to meet available funds.
5. Nonprofits may submit grant applications yearly. Previous grant awards, even in the preceding year, will not be automatically disqualifying but will be a consideration in the committees review and recommendation. The basic Foundation criteria is to provide the most benefit for the most people. The committee will weigh all applications equally on that basis.
6. The Foundation favors requests that impact large numbers of people and further the Club’s diversity and inclusion goals. Diversity refers to the range of human differences reflected in our community including, but not limited to, race, ethnicity, color, gender, ability status, sexual orientation, religion, and social class. Inclusion refers to the acknowledgement and welcoming of the full range of human diversity.
7. The Foundation strongly favors capital needs projects that assist at risk youth or women and children living in need (*e.g.*, those who cannot adequately provide for basic living expenses such as food, clothing, shelter, health care, including mental health, and transportation).

8. Although not an absolute requirement, the Foundation favors projects or organizations that are supported or recommended by a Club member. The Foundation strongly suggests a Club member be involved with the nonprofit as a donor, volunteer, or board member and that the Rotarian endorse the application form.
9. Grant recipients must use granted funds for the purpose(s) presented to the Foundation and must account for all funds granted to the Committee and the Foundation Trustees (“Trustees”) when so requested. Unless specified in the Application, all granted funds must be used for the purpose identified in the Application within one year of the applicant’s receipt of funds. Grant recipients must be prepared to present receipts for purchased capital items. Grant recipients must be prepared to make presentations to the Committee members and the Trustees or assist in making presentations, as requested. Grant recipients must return granted funds to the Foundation when not used as stated or intended within the one-year period or any longer period specified in the Application.
10. Grants shall be made only:
  - a. To charitable organizations which qualify for exemptions from federal income tax under Section 501(c)(3) of the Internal Revenue Code (“Code”) and contributions to which are deductible under Sections 170(C), 2055, or 2522 of the Code;
  - b. For “charitable purposes,” which shall include only charitable, scientific, literary or educational purposes within the meaning of those terms as used in Section 501(c)(3) of the Code, but only such purposes as also constitute public charitable purposes under the laws of the State of Oklahoma; or
  - c. To states, territories or possessions of the United States, any political subdivision of any of the foregoing, or to the United States of the District of Columbia, but only for charitable purposes.
11. Grant requests for technology items (e.g., computers, printers, networking equipment, copy machines, and projectors) must be reviewed through 501tech.net (<https://www.501tech.net/>), a partner of the Tulsa Community Foundation, prior to submission. 501tech.net will issue a written opinion which must be submitted with the grant application (submit requests to them *early!*). Final submission should include specifications and price quotations for all requested equipment. The application must specify how the equipment supports the organization’s project.
12. The Foundation accepts applications from faith-based organizations. The program or project for which the application is made must meet the conditions set forth in item 10(b) above and further, the program or project must not have as its purpose the promotion of any religious agenda or the favoring of any religious viewpoint over another.
13. Applications for large capital projects should anticipate that the Foundation may require the applicant secure either matching funds, other grants, or otherwise demonstrate that the full project cost has been secured before the Foundation will issue a check.
14. The Foundation has a policy of reviewing projects a year or more after funding to monitor the effectiveness of its grant program. By submitting a grant application, applicant agrees to fully cooperate with the initial inspection and with any follow-up requests.
15. Applicant must clearly divulge all assets and sources of funds that benefit the applicant or its affiliated organizations. For instance, if applicant is the beneficiary of a separate endowment or building fund and that asset is not shown on applicant’s financial statements, that information must be provided as a part of the grant application, together with information regarding annual funds available from those sources.

Please sign below to acknowledge receipt and adherence to the Rotary Club of Tulsa Foundation Grant Guidelines:

Applicant Contact & Title (please print)	Signature	Date
Executive Director or Board Chair	Signature	Date