



Rotary Club of Fort Myers

Trust Fund Committee

RE: GRANT GUIDELINES

-PURPOSE -

The Trust Fund Committee is responsible for reviewing requests for the Club's grants. The Trust Fund Committee reviews grant applications and makes the appropriate recommendations to the Board of Directors acting as Trustees of the Trust Fund. In addition, the Trust Fund Committee is tasked with the oversight of the Judd Endowment Fund.

-ELIGIBILITY REQUIREMENTS-

Grants are limited to tax-exempt organizations (school programs, government entities or 501(c)(3) non profit corporations). To be eligible to receive a grant an application must be completed and submitted to the club. Incomplete applications will not be considered. The Rotary Club of Fort Myers and the Trust Fund Committee reserve the right at their sole discretion to make the final determination of the eligibility of each application.

-WHAT WE FUND-

The trust fund prefers to make grants to fund specific projects and equipment that will be used in helping an organization achieve its mission.

- 1) *Quarterly Grant Cycle* - Typical grants are for \$5,000 or less to recipients that improve the quality of life in the greater Fort Myers community. Organizations may apply for a grant once in any twelve-month period.
- 2) *Fort Myers Wine Fest Proceeds* - Typically the first \$20,000 or ten percent of the gross proceeds (whichever is greater) of the proceeds go back into the Club's quarterly grant cycle. The remainder is split amongst organizations that make the quality of life better for the children of Southwest Florida.

Projects will be well regarded if they can show the effort:

- Is likely to make a substantial difference in the quality of community life.
- Will strengthen families and the community.
- Can facilitate collaboration among relevant groups and organizations, with emphasis on regional cooperation across geographic boundaries.
- Will seek to build partnerships between agencies, local government, or public institutions in order to create positive change.
- Has the ability to expand meaningful civic engagement and build social capital.
- Will help nonprofit organizations build capacity and become more effective.
- Will leverage change in the capacity of community-wide systems rather than individual organizations.



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-WHAT WE DO NOT NORMALLY FUND-

Multi-Year Projects
Capital Campaigns
Individuals
Travel
Normal Operating Expenses
Event Sponsorships
Annual Campaigns/Membership Drives
Endowments
Debt Retirement
Professional Conferences
Sports Teams
Political Campaigns
Research
Sectarian purposes (i.e. programs that promote a religious doctrine)
Fraternal Organizations or societies

-APPLICATION PROCESS-

Grant applications must be completed and returned to the Club's office or submitted on-line. Grant applications may be picked up at the Club's office or by download from the Club's web site at www.rotaryfortmyers.org. At time of submission, applicant must submit a photocopy of its most recent determination letter from the IRS with their completed forms.

-GRANT CYCLES-

Grants are typically approved on a quarterly basis.

Cycle	Submission Deadlines Third Thursday:	Board Meetings Third Thursday:
ONE	July	August
TWO	October	November
THREE	January	February
FOUR	May	June

As more fully noted in the application form, The Rotary Club of Fort Myers reserves the right to audit the disbursement of the funds to ensure that they are used per your application.



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-FREQUENTLY ASKED QUESTIONS-

What is the process to apply?

A Grant Application may be filled out and submitted on-line, or mailed to the office of the Rotary Club of Fort Myers at 2365 West First St, Fort Myers, FL 33901

How long will it take?

The grant cycle is normally 60 days. The Trust Fund Committee views the merits of each and every application, prior to submission to the Board of the Directors. The Trust Fund Committee may be in touch with you for further clarification.

When will I know if I have been approved?

The Rotary Club of Fort Myers has Board Meetings in August, November, February and May. Written notification of the decision will take place following the respective meeting. A letter will be sent to each applicant with the Board's decision. Please do not call the office for an update.

May I apply for consecutive years of funding?

Our preference is to benefit as many worthy organizations as possible; therefore, our preference is to award grants to new and different organizations. However, you may apply every other year.

Is there a way to appeal a rejection?

Decisions by the Trust Fund Committee and Board of Directors are final. You may re-apply the year following the rejection if you meet the necessary qualifications.