



## GRANT GUIDELINES

The Rotary Club of Tulsa Foundation (“Club Foundation”), formerly Tulsa Rotary Community Fund, uses the following Guidelines for the approval of projects requesting charitable donations from the Club Foundation, all of which Guidelines are applied flexibly and none of which, in and of itself, lead to approval or denial of a particular request:

1. The Club Foundation gives strong preference to projects that will benefit persons living in Tulsa and adjoining counties.
2. The Club Foundation favors capital needs or special projects. Requests to fund general operations will only be accepted for organizations that have existed for three (3) years or less unless the applicant can demonstrate a special need for one-time operational funds that will not be needed in future years.
3. An organization can receive funding for a maximum of three (3) successive years. However, the Club Foundation’s goal is to assist a variety of projects.
4. The Club Foundation favors a request that will impact many people.
5. The Club Foundation favors projects that will provide assistance to people living in need (such as those who cannot adequately provide for basic living expenses such as food, clothing, shelter, health care (including mental health) and transportation).
6. The Club Foundation favors projects that will be beneficial to youth, particularly if it helps educate youth on business and the free enterprise system.
7. The Club Foundation favors a project that is endorsed or recommended by a Rotary Club of Tulsa member as opposed to a request coming from outside the Club.
8. Grant recipients must use granted funds for the purpose(s) presented to the Club Foundation and must account for all funds granted to the Club Foundation Grants Committee (“Committee”) and the Trustees. 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 Club Foundation when not used as stated or intended.
9. Grants shall be made only:
  - a. To charitable organizations which qualify for exemptions from federal income tax under Section 501(c)(3) of the 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.

10. Grant requests for technology items (computers, printers, networking equipment, copy machines, projectors, etc.) should include specifications and price quotations for all requested equipment. If the grant application is approved, Rotary members who have expertise in technology related areas may recommend alternate equipment or pricing sources if, in their opinion, more favorable equipment pricing is available.
11. The Club 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 9(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.
12. The Club Foundation accepts applications from cultural or artistic organizations. However, the applicant must show how the program or project for which the application is made complies with the mission of Rotary and the purpose of the Rotary Club of Tulsa Foundation.
13. Applications for large capital projects should anticipate that the Club Foundation may require the applicant secure either matching funds, other grants or otherwise demonstrate that the full project cost has been secured, before the Club Foundation will issue a check. Funding requests so deferred will be reserved for 120 days beyond the end of the Club Foundation's fiscal year-end of June 30<sup>th</sup> unless otherwise extended by the Trustees.
14. The Club 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 applicants financial statements, that information must be provided as a part of the grant application.