

## Oakwood Rotary Foundation Request for Funds Form

**Request Disposition:** (To be completed by Oakwood Rotary Foundation)

Board Meeting Date: \_\_\_\_\_

☐ Approved as Requested: \$ \_\_\_\_\_ Date Pd: \_\_\_\_\_ Check #: \_\_\_\_\_

☐ Approved as Modified: \$ \_\_\_\_\_ Date Pd: \_\_\_\_\_ Check #: \_\_\_\_\_

☐ Disapproved | Reason: \_\_\_\_\_

☐ Tabled | Reason / Action: \_\_\_\_\_

**In general, funds are typically not granted for:**

- 1) Operating or Travel Expenses
- 2) Individuals (as opposed to organizations)
- 3) Recurring Programs
- 4) Large Capitalization Efforts or Endowments Contributions

**Criteria:**

- Non-profit status as prescribed under §501(c)(3) of the Internal Revenue Code
- Organization's need and overall impact to the organization/project
- Participation of Rotary Club members on boards and committees of the receiving organization
- Demonstrated support of and impact on Rotary International and Oakwood Rotary objectives
- Previous and/or potential program or organization success
- Contributions sought from Rotary compared to other sources

Please Note: If the Oakwood Rotary Foundation decides to grant funds, it should be understood by the recipients(s) that the Foundation typically does so on a “one-time” basis. Recurring requests for the same purpose are not encouraged but may be submitted. Grants for “seed funding” to assist with initial start-up costs are encouraged if the project is to eventually become self-sustaining. Efforts, which may qualify for additional matching funds, are also encouraged.

PLEASE PRINT OR TYPE WHEN COMPLETING THIS FORM

Oakwood Rotarian Sponsoring Request: \_\_\_\_\_

Rotarian Involvement: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

Email Address: \_\_\_\_\_

1. Date Request Submitted: \_\_\_\_\_

2. Amount of Funds Requested: \$ \_\_\_\_\_

3. Date Funds are Needed: \_\_\_\_\_

4. Name of Person (Organization) for Whom (Which) Funds are being Requested: (Check made to: )

Person (Organization): \_\_\_\_\_

Title (Within the Club): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

5. If an organization, briefly describe its purpose (attach Brochure if available):

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6. Does this organization qualify under Section §501(c)(3) of the Internal Revenue Code?

☐ YES   ☐ NO   (If YES, Tax ID#: \_\_\_\_\_ )

7. Describe, specifically, how the requested funds will be used:

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8. Who specifically (or what organization) will benefit from the funds, if provided:

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9. Have you or others requested funds from the Oakwood Rotary Foundation for this same project (organization or Person) in the past?

☐ YES   ☐ NO

10. Indicate other sources of Funds for this project/purpose (include amounts):

- \$ \_\_\_\_\_ from \_\_\_\_\_
- \$ \_\_\_\_\_ from \_\_\_\_\_
- \$ \_\_\_\_\_ from \_\_\_\_\_

11. What other service clubs do you expect to contribute to this project (Please name them):

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**THANK YOU!**

Please submit completed form to:

President  
Rotary Foundation of Oakwood  
P.O. Box 925  
Dayton, OH 45409

## **Oakwood Rotary Foundation Grant Guidelines**

The overall goal of the Oakwood Rotary Foundation is to financially assist non-profit, service efforts that benefit the largest possible segment of our community. Preference will be given to organizations conducting projects within the Miami Valley Region, but consideration will also be given to those outside the region, to include our State, National, and International communities, as well.

### **Giving Areas of Emphasis:**

1. Non-profit, 501(c)(3) organization qualification (Tax ID# must be provided)
2. Overall impact to the organization, project, and/or community
3. Efforts where a Rotarian is active within the organization and/or on its board and where that organization advances the service objectives of Rotary International
4. Efforts where "seed funding" assists initial start-up, then the project becomes self-sustaining
5. Projects where funding for a specific, tangible item is identified
6. Projects benefiting children and youth at risk
7. Support for families in need
8. Developing youth leadership
9. Community educational efforts
10. Fostering the fine and performing arts in the community
11. Projects which potentially qualify for further grant-matching opportunities

### **Funding is typically not granted for the following:**

1. Annual operating expenses
2. Programs with similar recurring needs
3. Individuals (as opposed to non-profit organizations)
4. Travel expenses
5. Large capitalization efforts or endowments
6. Oakwood school-related requests better served by the Oakwood Educational Foundation