



## ***Toledo Rotary Club Foundation Traditional Grant Guidelines***

The Toledo Rotary Club Foundation was established to support the educational and charitable efforts of the Rotary Club of Toledo. Foundation funding is made possible through the generous contributions of members of the Rotary Club of Toledo and its friends. The Traditional Grant process typically awards approximately 20 grants annually. The maximum grant amount is \$10,000.

The Toledo Rotary Club Foundation is a 501(c)(3) tax-exempt, nonprofit corporation that serves as the primary community charitable arm of the Rotary Club of Toledo. Annual contributions to the Foundation are added to the Toledo Rotary Club Foundation Fund administered by the Greater Toledo Community Foundation. That fund is utilized to support grants for charitable and educational purposes, primarily in the Toledo and northwest Ohio areas.

The Rotary Club of Toledo, established in May 1912, created a charitable fund by 1915, when it began funding medical and educational services directed to children with physical disabilities in the Toledo area. The charitable activities of the members of the Rotary Club of Toledo have a 100-year history.

### **Eligibility**

- The Toledo Rotary Club Foundation grants exclusively to nonprofit, 501(c)(3) tax-exempt organizations.
- Organizations receiving a traditional grant award may not apply for another grant within 2 years of the approval date on the Grant Agreement.
- Applicants who are declined may only apply for a grant one time during a Rotary fiscal year (July 1 – June 30).
- Grant application deadlines are **July 31 and January 31**.

### **Priorities of The Rotary Club of Toledo**

Promoting Peace, Fighting Disease, Providing Clean Water, Sanitation & Hygiene, Saving Mothers and Children, Supporting Education, Growing Local Economies and Protecting the Environment.

### **Grant Priorities**

The Foundation only considers projects and programs with community or international value, with a preference for those consistent with Rotary International's seven areas of focus: promoting peace; fighting disease; providing clean water, sanitation and hygiene; saving mothers and children; supporting education; growing local economies; and protecting the environment. Among local projects, those that have an impact in the City of Toledo or throughout northwest Ohio are preferred. Priority will be given to collaborations among two or more partner organizations.

Competitive grant proposals must address one of the following areas:

- **Community Services:** Projects that impact the local community and make northwest Ohio a better place.
- **Disability Services:** Projects that support individuals in maintaining a lifestyle of their choosing, no matter their ability.

- **International Services:** Projects that have international or broader impact by advancing understanding, goodwill and peace. Grants that are more local in nature and specifically cover topics that promote peace are reviewed by the Peace Committee, a sub-committee of International Services.
- **Vocational Services:** Projects that provide mentoring and assistance for youth or adults in professions and trades.
- **Environmental Services:** Projects that strengthen the conservation and protection of natural resources, advance ecological sustainability and foster harmony between communities and the environment.
- **Youth Services:** Projects that directly impact local youth and their current challenges.

*Note:* Any committee above accepts requests that benefit **youth** as long as it meets the specific intent of the committee.

**The Toledo Rotary Club Foundation will not usually make grants to:**

- Support the general operating budget or budget deficit of established organizations
- Pay for a program, project, or purchase that has already been expensed prior to approval of the Toledo Rotary Club Foundation grant
- Support lines of credit or capital campaigns
- Fund organizational endowments

**Grant Procedures**

- Applicants must complete and submit the grant application and upload all supporting documentation through the Greater Toledo Community Foundation’s online system at:  
<https://www.grantinterface.com/Home/Logon?urlkey=toledocf>.
- If your organization has not set up an account in the application system, you will be prompted to do so. Each time you need to access your application, you will need to login to this grant portal to view, edit and submit your application. Grant agreements and grant reports must be accessed this way as well.
- The following sections must be completed in the grant application:

**Grant Sections –**

I. Proposal Content

- Project Name
- Total Project Budget
- Amount Requested from Rotary
- Staff Capacity: **A DROPDOWN MENU**
- How did you become aware of this opportunity? **A DROPDOWN MENU**
- To which Rotary Committee are you targeting your proposal? *(Note: Any committee above accepts requests that benefit youth as long as it meets the specific intent of the committee.) THIS IS A DROPDOWN MENU.*
- How long has your organization been in existence?

II. Project Description

- Project Location
- Project Goals and Objectives: Describe the project for which you are requesting funding, state goals, objectives and community need that will be addressed.
- Population to be served: Describe the population and include a number of participants.
- Implementation: Summarize the plans and time frame. Note: Funds may be used for 12 months total.
- Project Oversight: Staff members or volunteers completing the project and their qualifications
- Communication of Results: How will you publicize your award
- Evaluation Criteria: How will you measure the success of this project?
- Is this a new project?

III. Financial Information

- Is this a new project? If not, how long has the program/project been in existence

- What are your plans if funding is not approved?
- What are your three largest funding sources? For your entire organization. List name of funder and amount.
- List any other funders to whom this proposal has been and/or will be submitted
- Support and Sustainability: How will you maintain this project after Rotary funds are expended?
- Previous Rotary Funding (What years and in what amounts? What was the nature of the project(s) funded?)

IV. Due Diligence Documents (Project Attachments). The following supporting documentation is required and must be uploaded into your application:

- Project Budget – Include a one-page project budget (see Project Budget Template), which: specifies the requested grant period; delineates line-item expenses that clearly detail the proposed use of grant funds; and lists projected income (both solicited and received) and expenses for the proposed project.
- Board List – The names and affiliations of the organization’s Board of Trustees.
- IRS Letter – A copy of the organization’s tax exemption letter from the Internal Revenue Service.
- Organization Background – Provide a one-page document with your organization’s background and history including a list of programming.
- Financial Statements – There are two options for submission of financial statements, which include:
  - Option 1 – If the organization has had an audit prepared within 18 months of the application submission, please provide the full audit. An organization’s IRS Form 990 will not be accepted in place of the required financial statements; or
  - Option 2 – If audited financial statements for this timeframe are not available, provide the unaudited income & expense statement (P&L) and balance sheet for the organization’s most recent fiscal year-end. An organization’s IRS Form 990 will not be accepted in place of the required financial statements. Note that only statements reporting information prepared within 18 months of the application submission will be accepted.
- Operating Budget – A board-approved operating budget for the current fiscal year of the organization.

**Important to Note:**

- Grant Agreements
  - Applicants whose projects are approved will be contacted by Greater Toledo Community Foundation. Grantees are required to sign a Grant Agreement and complete assigned, required progress reports in the online portal system. Organizations that do not adhere to the Grant Agreement may be asked to return the grant funds.
- **Grant reports are required.** Be aware that the following information will be requested at the end of the grant award period:
  - Final project budget report with expenses listed. All funds must be expended by the date on your grant agreement.
  - Grant Activities
  - Narrative Story (a story about a participant or how the results of the grant affected the organization)
  - Project Outcomes (Did you meet the goals and outcomes outlined in your proposal?)
  - Final Evaluation (Based on your evaluation criteria)
  - Any Problems or Challenges and How You Solved Them
  - Future Support
  - # of Participants Served
  - # of Partners
  - Additional Funds Raised

- Photos of the project are appreciated.
- Significant Materials including external reports or how Rotary was recognized.
  
- The Grant Review Process
  - Rotary Club members decide which grants to move forward for funding via their committee process. All applicants should be prepared to appear before the Rotary committee to which you are making the request and to host a site visit, if requested.
  - The Rotary Committees review grants and sends their list of finalists to the Foundation Advisory Committee (FAC) for recommendation.
  - The FAC sends their final recommendations to the Toledo Rotary Club Board of Trustees for approval after which final grant approval is voted on by the Toledo Rotary Club Foundation Board.
  - The length of the review process varies. Typically, applicants are notified near the time of the next application deadline. Please plan your budget and project timelines accordingly. (For example, a grant application submitted by the August 31 grant deadline, might receive an award letter in late October and a grant check in November.)

For additional information, please contact:

Jaci Bugaj: Executive Director  
Toledo Rotary Club Foundation  
709 Madison Ave, Suite 305  
Toledo, Ohio 43606  
Phone: 419-241-7060  
Email: [info@toledorotary.org](mailto:info@toledorotary.org)