



Rotary Club of Santa Cruz Sunrise

P.O. Box 7026
Santa Cruz, CA 95061

Charities and Grants Request

The Rotary Club of Santa Cruz Sunrise is pleased to offer monetary grants to deserving organizations and individuals in the Santa Cruz area. Review the attached Guidelines and Criteria to determine eligibility.

To apply, (1) complete the information below and (2) attach a letter, on organization letterhead, if possible, describing your organization/cause and how the grant funds will be used. Submit your application to the following address:

Rotary Club of Santa Cruz Sunrise
Charities and Grants Committee
PO Box 7026
Santa Cruz, CA 95060

Question should be directed to the Charities and Grants Committee Chairman, Roger Swenson, at CharitiesAndGrants@SantaCruzSunriseRotary.org or 408-483-8579.

The Rotary Club of Santa Cruz Sunrise is proud to raise and distribute thousands of dollars each year to a wide range of recipients. We look forward to having the opportunity to assist you in your mission.

Name of Organization/Cause applying for grant: _____

Name of person applying: _____

Your Relationship to the Organization/Cause: _____

Your Relationship to Santa Cruz Sunrise Rotary: _____

Phone #(s): _____ Email : _____

Nature of Request (check all that apply):

Non-profit School Youth Sports Elderly Other: _____

Briefly, how funds will be used: _____

Signature of Applicant _____ Date ____/____/____

(Please attach a detailed request letter on organization letterhead, if possible)

THE FOUR-WAY TEST "of the things we think, say or do"

1st is it the **TRUTH**? 2nd is it **FAIR** to all concerned? 3rd will it bring **GOODWILL** and **BETTER FRIENDSHIPS**? 4th will it be **BENEFICIAL** to all concerned?

CHARITIES AND GRANTS
GUIDELINES/CRITERIA
ROTARY CLUB OF SANTA CRUZ SUNRISE

1. Amount appropriated by the Board of Directors in the FY budget for Charities and Grants is the total amount not to be exceeded in funding grants by the Charities and Grants Committee during that FY unless directed by the Board.
2. Preference is to be given to requests that benefit local activities/groups. Local is defined as to recipients of grants residing in the Santa Cruz and Soquel area.
3. Focus on requests should indicate benefit to either children, youth, or the elderly as the primary criteria.
4. Consideration may be given to requests where members of the Rotary Club have personal knowledge or involvement. However, requests must come in writing from an organization and not directly from a member of the club.
5. Preference will be given to organizations who have or are willing to support and acknowledge Rotary's contribution.
6. When giving to a group, the efficiency of the operation will be considered. Size of group, evidence of attempts to fundraise, regional and national affiliation, and numbers of individuals who will benefit will be reviewed.
7. Individual grants will not generally exceed \$250 per individual. Requests for grants by groups in excess of \$500 will require a complete application.
8. Due to funding limits and to assure that requests for funds are available to many organizations, multiple requests from the same organization might not be granted.
9. All requests must be in writing including the requestor's name, address, amount of the request, and to whom the funds will be distributed. All requests must be routed by the requestor to the Charities and Grants Committee for their review and requests approved will be presented to the Board of Directors at the next Board meeting. No grants will be authorized except as described above.
10. If the Board overrides the Charities and Grants Committee's recommendations, the Board must put the matter to a majority vote of the membership attending the next regularly scheduled meeting following the Board meeting in which the issue was presented.
11. Grants in excess of \$2000 that have been approved by the Charities and Grants Committee must be presented to the Board and membership for a majority vote of approval.
12. An accounting of the organizations and amounts expended will be submitted to the Reville on a monthly basis for informational purposes to the membership.
13. Changes to the Guidelines/Criteria must be reviewed and approved by the Board and by a simple majority of the membership.