

# SAN CARLOS ROTARY ENDOWMENT

## Grant Request

### Instructions for completing this Grant Request

If you are interested in applying for a Grant, all sections of this Grant Request form must be completed. Your Grant application will be eligible only if all required form fields have been completed. If a particular section does not apply to your project, indicate so by marking the box labeled "N/A" next to the section header. A detailed budget must accompany this Grant Request.

### Organization Details

Full Legal Organization Name: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_  
Postal/Zip Code: \_\_\_\_\_  
State/Country: \_\_\_\_\_

### Organization Qualifications

Qualified 501(c); tax-exempt organization with a valid EIN from the IRS (US); accredited educational institution; government agency

### Partner Organization Information

Complete this section if an outside organization will participate in the planning and/or execution of this project. Outside organizations include other Rotary Clubs and organizations with no Rotary affiliation.  N/A

Name of Sponsoring Organization: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Contact Email Address: \_\_\_\_\_  
Web Site Address: \_\_\_\_\_ Tax ID Number: \_\_\_\_\_

### Grant Recipient Information

Complete this section if the organizational details above do not fully provide Grant Recipient Information requested herein.  N/A

Name of Recipient Organization: \_\_\_\_\_  
Contact Name: \_\_\_\_\_ Telephone: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Web Site Address: \_\_\_\_\_  
Tax ID Number: \_\_\_\_\_

### Project Information

Has the San Carlos Rotary Endowment, a division of Rotary Club of San Carlos Community, Inc. and/or the Rotary Club of San Carlos Community Service, Inc. supported this project previously?  Yes  No

If yes, what year was last supported and in what amount? Year: \_\_\_\_\_ Amount: \$ \_\_\_\_\_

Was a Final Report submitted for the previous project?  Yes  No, the report is attached

A Final Report for a previous, similar project must be submitted before a new Grant will be accepted for consideration.

If this Grant is related to a project funded by the SAN CARLOS ROTARY ENDOWMENT, indicate the Grant Number below.

SCRE Grant Number: \_\_\_\_\_

If this Grant will not be completed within 1 year, indicate the date when the grant will be complete: \_\_\_\_\_

**Financial Information**

A detailed budget is attached. (REQUIRED)

Yes

Please set forth your percentage of administrative expenses (overhead) to your actual organization's income:

**Project Goals**

Using bullet points in the space below, briefly describe the goals to be accomplished through this project. **If you need additional space, please attach additional pages to this Grant Request application.**

[Empty box for Project Goals]

**Grant Criteria**

In the space below, briefly describe how the project goals will meet the Grant criteria as otherwise set forth in the SAN CARLOS ROTARY ENDOWMENT Grant Policy and Procedures set forth in the 3-page document entitled the SAN CARLOS ROTARY ENDOWMENT GRANT POLICY AND PROCEDURES.

[Empty box for Grant Criteria]

**General Description of Project**

In the space below, briefly describe how the project goals will be achieved. Include a description of how this event will benefit the community to be served.

[Empty box for General Description of Project]

In the space below, briefly describe how the SAN CARLOS ROTARY ENDOWMENT will be recognized as a sponsor of the project, and how the project or event will be publicized.

[Empty box for Sponsor Recognition]

**Proposal Request**

Program/Project Name: \_\_\_\_\_

Requested Amount: \$ \_\_\_\_\_

Total Program Budget: \$ \_\_\_\_\_

**AUTHORIZATIONS**

All requests for funding by the SAN CARLOS ROTARY ENDOWMENT must be reviewed and approved by the Endowment Board of Directors, and thereafter by the Board of the Rotary Club of San Carlos Community Service, Inc. Grant applications must be signed by the project chairperson and submitted to:

SAN CARLOS ROTARY ENDOWMENT  
POST OFFICE BOX 515  
SAN CARLOS, CA 94070

# SAN CARLOS ROTARY ENDOWMENT

## Grant Project / Event Final Report

**Project/Event Name/Title:** \_\_\_\_\_

**Project/Event Date:** \_\_\_\_\_

**Grant Amount:** \_\_\_\_\_

**Project/Event Chair/Co-chairs:**

Name: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

Name: \_\_\_\_\_ Phone: (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

**Project/Event Organization Partner(s) (if any):** \_\_\_\_\_

**Project/Event Objectives:** \_\_\_\_\_

**Extent to which objectives were met:** \_\_\_\_\_

- 
- 1) Financial Information (Regarding SAN CARLOS ROTARY ENDOWMENT Funds awarded by this Grant).
    - a) Attach a detailed, categorized expense/disbursement report on the use of funds provided by this grant. The entire Final Report must include copies of all receipts with respect to all expenses, as well as an itemized list of expenses, attached to the Final Report.
    - b) All funds remaining at the project's/event's completion: \$ \_\_\_\_\_
    - c) Any funds remaining that were not used for the designated project arising from the grant must be returned within thirty (30) days of completion of the project to the SAN CARLOS ROTARY ENDOWMENT.
    - d) A check for \$ \_\_\_\_\_ payable to the "SAN CARLOS ROTARY ENDOWMENT" for returning all unused grant funds is attached.  Yes  N/A (All funds provided by this grant were expended.)
  - 2) Project/Event follow-up financial review (If easier and/or quicker, you may mark up a second copy of the expense/disbursement report in answering in answering "a" and "b" below):
    - a) Identify (#) the budget income and expenses categories which should be eliminated or reduced (by what amount) as a result of the experience gained through this Project/Event, if this project/event were to be done again.
    - b) Asterisk (\*) those budget categories/expenses which should be increased (and estimate amount) for a future similar Project/Event to make it more successful and result in all funds being spent as wisely and as effectively as possible.

- 3) Project/Event Planning/Logistics "lessons learned" (non-financial factors):
- a) What should be done differently if this Project/Event is done again to achieve a more successful/better result/outcome?
  - b) List observations, including "lessons learned" during the Project/Event which were overlooked, which if added would result in a more favorable/successful outcome:
  - c) State whether or not you recommend this Project/Event be done again in the future years and very briefly explain why or why not.
- 4) Publicity: It is inherent in the SAN CARLOS ROTARY ENDOWMENT's support of and contributions to a Project/Event that publicity credit be actively addressed, sought and arranged so that that the SAN CARLOS ROTARY ENDOWMENT and the Rotary Club of San Carlos Community Service, Inc. are noted as the contributors of the funds and personnel supporting this Project/Event. (Attach additional sheets, if needed.)
- a) Describe how you ensured that the general public became aware that this was a SAN CARLOS ROTARY ENDOWMENT/Rotary Club of San Carlos Community Service, Inc. sponsored project/event and to what extent inherent publicity without specific focused effort occurred:
  - b) Describe how your publicity plan was established and carried out and what success you achieved. (Please attach a copy of your Publicity Plan.)
  - c) Describe factors of your publicity plan which you would change, specifically, to result in better, more effective publicity "credit" for SAN CARLOS ROTARY ENDOWMENT/Rotary Club of San Carlos Community Service, Inc. in providing the necessary funding and personnel for this project:

*Reminder: This report with completed accounting of sources and expenditure of funds, including all receipts) must be submitted to the SAN CARLOS ROTARY ENDOWMENT Board within 30 days of the completion of the project or event for which the grant was awarded.*

Project/Event Chair Signature: \_\_\_\_\_ Date: \_\_\_\_\_