

BEVERLY HILLS ROTARY COMMUNITY FOUNDATION

GUIDELINES

MISSION STATEMENT

The Beverly Hills Rotary Community Foundation supports a wide range of philanthropic organizations locally in Beverly Hills and the Greater Los Angeles area and globally in developing nations.

LOCAL COMMUNITY GRANTS

The Beverly Hills Rotary Community Foundation of the Rotary Club of Beverly Hills seeks grant applications **from its members** for 501 (c)(3) organizations primarily benefiting the Beverly Hills and Greater Los Angeles Area. The Foundation prioritizes funding organizations that have a deep level of community involvement whose mission is aligned with one or more of our four priority areas: Education, Humanitarian and Human Services, Hunger Relief and Homelessness, and Assisting People with Disabilities. Priority is also given to organizations where our gift will have meaningful impact on the organization and the people it is serving.

Strong consideration will be given to proposals with participation of the Club's membership and/or joint projects with other Rotary Clubs. Rotary involvement can include:

- Managing the project
- Providing expertise
- Volunteering to participate in the project
- Providing the match for a grant
- Volunteer support from High School Interact members

Beverly Hills Rotary Community Foundation does not consider unsolicited requests for financial support. A member in good standing of The Rotary Club of Beverly Hills must sponsor requests and the member cannot be an employee of the organization or receive any type of compensation or remuneration from the organization.

GRANT REQUEST REVIEW CYCLE AND DEADLINES

The Foundation has four grant cycles per year, and only accepts one grant application from an organization per 12-month period. The sponsoring Rotary Member will be required to assist in the Charitable Committee review. Applications are accepted up through four deadlines.

First Quarter: For consideration during our September grant cycle, a grant application must be submitted by September 15. Applications will be accepted from July 1 through September 15. Our Charity Committee reviews all applications and will make recommendations for final approval by the Board of Directors. Notification of the amount of grant decisions will take place in late October.

Second Quarter: For consideration during our November grant cycle, a grant application must be submitted by November 30. Applications will be accepted from September 16 to November 30. Our Charity Committee reviews all applications and will make recommendations for final approval by the Board of Directors. Notification of the amount of grant decisions will take place in late January.

Third Quarter: For consideration during our March grant cycle, a grant application must be submitted by March 15. Applications will be accepted from December 1 through March 15. Our Charity Committee reviews all applications and will make recommendations for final approval by the Board of Directors. Notification of the amount of grant decisions will take place in late April.

Fourth Quarter: For consideration during our May grant cycle, a grant application must be submitted by May 15. Applications will be accepted from March 16 through May 15. Our Charity Committee reviews all applications and will make recommendations for final approval by the Board of Directors.

FUNDING LIMITS

Proposals from \$500 to \$5,000 are encouraged, and larger requests will be considered and reviewed on a case-by-case basis. Any awarded amounts are subject to the Charity Committee's and the Board of Directors' discretion and funding availability.

ELIGIBLE REQUESTS

The Foundation makes grants to charitable organizations as classified under Section 501(c)(3) of the Internal Revenue Service code. The organizations must serve the Beverly Hills and/or Greater Los Angeles community and whose mission is aligned with our four priority areas:

1. **Education** - Includes programs that focus on formal K-12 education, after-school programs, music and arts education, teacher development, literacy and higher education
2. **Humanitarian and Human Services** - Includes broad range of human services, community improvement, veterans support programs, abuse prevention, youth development programs, children and family services, early childhood development and parenting education.
3. **Hunger Relief and Homelessness** - Includes rent assistance, utility assistance, food assistance.
4. **Assisting People with Disabilities** - Includes funding for the care, training, sports programs and education of people with disabilities.

INELIGIBLE REQUESTS

As a standard practice, the Beverly Hills Rotary Community Foundation does not support and considers ineligible organizations that do not have a wide base of financial support or regular continuing operations. In general, the Foundation also does not make grants to support:

- Organizations that discriminate.
- Religious or membership-based organizations unless the program is open to the public without regard to affiliation.
- Fundraising activities, expenses, dinners, galas and events.
- Political activities.
- Capital or Building purchases.
- General operating funds.
- Other foundations or granting organizations.
- Lobbying, promoting or marketing efforts of an organization.
- Research.

The Foundation reserves the right to determine eligibility of any applicant and to adjust its guidelines in response to emerging needs, trends and opportunities.

BH ROTARY COMMUNITY FOUNDATION

GRANT APPLICATION

Please respond to all requirements below in a separate document to be submitted to the Charity Committee by a member in good standing of the Rotary Club of Beverly Hills. Be sure to respond to all requested information, otherwise your application will not be accepted.

TO BE COMPLETED BY ORGANIZATION

1. BH Rotary Member Sponsor

2. Name, address, email and telephone number of the organization and the primary contact person

3. Organization's IRS Tax ID Number

4. Organization's Mission Statement

5. Amount being requested from the BH Rotary community foundation

6. If this is a first-time grant request, please describe how the funds will be used?

7. If this is a repeat application, please specifically describe how the last grant was used, if all of the funding was utilized and what the current request is for. Specify (and attach and material) illustrating how The Rotary Club of Beverly Hills was acknowledged.

***Please note that new application and financials need to be submitted yearly in order to be considered for returning applicants

8. Information about the project the funds are earmarked to support, include:
 - a. number of people served
 - b. past performance
 - c. history of success
 - d. profile of the beneficiaries

9. What is the project budget, including projected sources of support and anticipated expenses?

10. What is the time period during which the funding will be used?

11. How will the Rotary Club of Beverly Hills be recognized in connection with this grant?

12. Provide copies of the following:
 - a. most recent audited financial statements
 - b. IRS Form 990
 - c. 501(c)(3) Determination Letter

TO BE COMPLETED BY ROTARIAN SPONSOR

1. What is your relationship to this organization?
2. Have you made a personal financial contribution to this organization?
3. Will this donation satisfy any personal financial obligation or planned donation to the organization?
4. As the sponsor, it is your responsibility to follow up with the organization to assure the funds are utilized as specified, in accordance with the request. You are also required to follow up to ensure that the club gets proper recognition ie; on donor walls, in publications, on the websites, etc. Are you willing to follow up with these guidelines?
5. If a grant is awarded, the check will be presented at a Rotary meeting on a mutually agreed upon Monday from 12-1:30pm. It will also be an opportunity for the recipient to share more info about the organization. Are you willing to invite the representative from the organization to be your guest at the Rotary meeting?