

## GRANT PROCESS OVERVIEW

### (Grant Application, Submission, Review & Approval Process)

- a. Rotary Service and the SF Rotary Foundation Board will consider grant requests consistent with the attached “Grant Criteria” outline.
- b. Grant requests are made via a thoroughly prepared “The San Francisco Rotary Foundation Grant Request” form. A detailed overview of the Grant Process, the Grant Request form and the Grant Final Report form can be found on the Club website: [www.sfrotary.com](http://www.sfrotary.com). Hover your cursor over (or click on) “Who We Are” and a drop-down menu will appear; click on “San Francisco Rotary Foundation” and you will be directed to the SF Rotary Foundation page where the Foundation Grant process forms can be found in the left-side menu. Click on each form to download and save to your local drive. *Before doing anything with either the Grant Request or Grant Final Report forms, please first read the “SFRF Grant Process Overview,” it is very important to take the time to carefully read this two-page overview and instruction document.*
- c. If the project/event committee or organization requesting an SFRF Grant received funds from SFRF previously for the same or a similar project/event and an SFRF Grant Final Report has not yet been submitted, the Final Report *must be included* with the new Grant Request form. ***Additional grant requests will not be considered without the previous grant Final Report.***
- d. Grant requests originate in the RCSF Community Service or International Service Committees and must be reviewed and approved by the Rotary Service Board prior to being submitted to the SFRF for consideration. Rotary Service’s review and approval is indicated by the Committee Chair, Service Board Director, and RCSF Service Board President all having reviewed and signed the Grant Request form.
- e. Fully completed Grant Request forms approved by the Rotary Service Board must be emailed to Grant Review Committee Chair, Fred Marschner ([fred.marschner@nm.com](mailto:fred.marschner@nm.com)) not less than seven days prior to the SFRF Board meeting at which consideration of the grant is desired.
- f. Grant requests early in the current Club/fiscal year will be reviewed for approval by the SFRF Board *when submitted properly and found fully complete*. If new events/projects arise later within a Club/Fiscal year, SFRF will review and consider them for approval *not later than the May SFRF Board meeting*, which will require the grant request(s) to be forwarded to the Grant Review Co-Chairpersons *not later than May 1<sup>st</sup>*.
- g. Upon receiving a grant request, the SFRF Grant Review Committee will review the Grant Request forms to ensure they are complete, that Rotary Service has reviewed and approved the grant application and all required signatures are affixed and, for projects/events previously provided a grant, a fully completed Final Report form has been received. If a Grant Request is not complete, it will be returned for completion. Only fully completed Grant Requests will be retained and presented to the SFRF Board for discussion and a vote on approval or denial.

## GRANT PROCESS OVERVIEW (CONT.)

### (Grant Application, Submission, Review & Approval Process)

- h. The SFRF Grant Review Committee will email all Grant Request forms found to be complete to all SFRF board members not later than five days prior to the next SFRF Board meeting, to allow SFRF Board members time to review and consider it/them.
- i. The Project/Event Committee Chair, or a well-informed representative of the project for which a grant is being requested, *must be available* at the SFRF Board meeting at which the grant request is to be considered, to be able to respond to questions which usually arise during Board consideration of a grant request.
- j. Following review of and discussion about a Grant Request, SFRF Board members will vote to approve (or approve for a lesser amount) or deny the grant request. Assuming a quorum of board members in attendance, a simple majority vote of the Board members present is necessary for approval.
- k. Following Board action on a Grant Request, the grant project/event chairperson, the Rotary Service Board Director involved and the Service Board President will be informed by email of the SFRF Board vote results and, if approved, when the grant check will be issued and awarded. Following approval, ***any changes in plans as to how SFRF funds are to be spent must be submitted to the SFRF Board for approval prior to any funds being spent.***
- l. Unless other arrangements are requested, checks for approved grants will be issued sixty (60) days prior to the date of the project/event for which the grant was awarded.
- m. The SFRF President (or an appointed representative) will make arrangements to present the grant award check directly to the Project/Event Committee Chair, Recipient Organization or the RCSF President at a regular Rotary membership meeting at least forty-five (45) days in advance of the project/event.
- n. ***Within thirty (30) days of completion of a grant funded project/event, each project/event Chair must complete an SFRF Grant Final Report form to be forwarded to the Service Committee chair and the Rotary Service Board for review and signatures.*** The Final Report must include a complete Expense Report, detailing how grant funds were used. For projects/events initiated and managed by non-Rotary partner organizations, while receipts are not required, such partners are expected to retain their receipts in the event the SFRF were to be audited. After review by the applicable Service Committee and Service Board and all required signatures have been affixed, the Final Report is to be emailed to Grant Review Committee Chair, Fred Marschner (fred.marschner@nm.com).
- o. For any project/event, if it is found to be unnecessary to spend all of the SFRF funds granted for expenses integral to and required for the project or event, or if the project/event is cancelled, all any such (remaining) funds must be returned to SFRF along with the Final Report within thirty (30) days of the project/event completion (or cancellation.)



## **GRANT CRITERIA**

The San Francisco Rotary Foundation (SFRF) Directors shall from time to time, distribute by loan or gift, the income and capital gains of the Foundation to directly benefit residents of the City and County of San Francisco, State of California and elsewhere such charitable, educational and scientific purposes as are embraced in the activities of the Rotary Club of San Francisco (RCSF) and Rotary Services, Inc.

In order to carry out this responsibility, SFRF Board has developed the following guidelines and criteria. Grants will be funded with strong consideration given to the following priority of giving:

1. RCSF events/projects which use the Club's name as a major sponsor of the project. Projects which require hands on service by Rotarians for either a one time or continuing service are to be considered highest priority.
2. Grant requests from Not for Profit organizations that have a history of working together with Rotarians. Grants involving funding of a specific project which offers: (1) Rotarians' active involvement in the project, (2) naming recognition for Rotary's support of the project, (3) a large number of Rotarians' continued active involvement with the organization will be the priority used when considering these projects.
3. Grant requests to provide emergency aid in response to a disaster relief effort.
4. Promote the Club's good name or benefit the Club by increasing membership, enhancing the membership's Rotary experience, or providing opportunities for Rotarians to work in one of the four avenues of service.
5. Grants for general funding support of Not for Profit Organizations which have Executive Directors, or multiple Rotarians on their Board who are active and supportive in their membership in the Rotary Club of San Francisco.
6. Grants for specific projects of Not for Profit Organizations, and Government Agencies which fail to meet the above criteria. Preference in funding will go to the organizations which support Rotary through memberships and publicly naming Rotary as a financial supporter.