



## ROTARIAN FOUNDATION OF LIVERMORE Beneficiary Application

The Rotarian Foundation of Livermore (RFL) Grant Application Review Committee will review each application and provide its award recommendations to the RFL Board of Directors for final approval. All applicants will be notified of the award determinations.

To submit an application:

1. Download this file to your desktop.
2. Complete the form using Adobe Acrobat Reader.
3. Save the file with your organization's title in the filename.
4. Email the completed application to [pat@coyles.com](mailto:pat@coyles.com). If organization is not a 501(c)(3) with IRS 990 available on-line, in addition to submitting this application also email a pdf with brief, complete financial statement and recent tax return, if available, with "supplement" and your organization's title in the filename.

Tax ID Number: \_\_\_\_\_

Beneficiary Organization

Name: \_\_\_\_\_

Address<

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Organization Web Site: \_\_\_\_\_

Name of Rotarian sponsor/contact: \_\_\_\_\_

Telephone: \_\_\_\_\_

Organization Type (select one)

Public School K-12 (Requires Principal or Dean endorsement)\*

Public Community College (Requires Principal or Dean endorsement)\*

Community Organization

Club of Livermore  
**Rotary**



Rotarian Foundation  
of Livermore

Community Charity of Livermore Valley

Other

Project Title (about 12 words or less):

Organization Summary

Provide a brief statement of your organization's history, mission and goals. (about 50 words or less).



Purpose of the requested grant; please state fully (about 500 words or less) in text box below.

Amount of grant requested: \$ \_\_\_\_\_

Note the total amount anticipated to be available for grant awards this year is ~\$37,000. Given that, the “sweet spot” for grants for us is in the \$3000 to \$5000 range,

Please list other potential sources of funding for this project in text box below.

Applicant has a verified Current Registration Status with the State of California Department of Justice, Office of the Attorney General’s Registry of Charitable Trusts (<http://oag.ca.gov/charities>)

Yes \_\_\_\_\_ No \_\_\_\_\_ Registration Not Required Reason: \_\_\_\_\_

(Note: Application is not eligible if Registration Status is not current at the time of submission.)

If organization is not a 501(c)(3) with IRS 990 available on-line, in addition to submitting this application also email a brief, complete financial statement and recent tax return, if available, with “supplement” and your organization’s title in the filename.

Grant Check Payable to: \_\_\_\_\_

Dates between which the grant will be used: \_\_\_\_\_ to \_\_\_\_\_

Location or area to be benefited (about 100 words or less) in text box below:

To save and submit the form, click the button below. Please save the form with **your organization's title in the filename**. It is the responsibility of the submitting organization to ensure all eligibility requirements have been met.

If you have any questions, please contact [pat@coyles.com](mailto:pat@coyles.com).

Please note that Rotary respects all races, creeds, and ethnicities and requires the same of projects that it supports.



## Rotarian Foundation Grant Applicants,

The two Rotary clubs of Livermore formed the Rotarian Foundation of Livermore for the purpose of making substantial charitable gifts to deserving projects within Livermore's sphere of influence. Since its establishment as a tax exempt qualified charitable fund in 1987, the Foundation corpus has reached its target of \$1 million, which will allow us to support major projects in Livermore over many years. To date we have funded in excess of \$1 million to support the local community.

The Mission of the Rotarian Foundation of Livermore is to improve opportunities for young people, promote community service, and improve the quality of life for the benefit of all in Livermore.

Grant applications will be evaluated using the following criteria:

- The benefit for the youth of Livermore
- The promotion of community service in Livermore
- The efficacy for meeting an important specific need
- The ability to have an enduring and extensive community benefit
- Will increase the leverage of the Foundation grant through matching support or volunteer efforts
- Will provide an opportunity to further recognition for the Foundation's efforts
- The result must respect the race, creed, and ethnicity of all beneficiaries

Applications must be received no later than **December 9, 2017**. If necessary, interviews for award finalists will be held in February 2018, with the awards being announced and funded in April, 2018

The application and supplemental information are available from our website at <http://www.rotarianfoundationlivermore.org> If you have any questions, I can be contacted at 925-960-5286 or email me at [pat@coyles.com](mailto:pat@coyles.com)

Patrick Coyle  
2017-2018 Grants Chairperson  
Rotarian Foundation of Livermore

### **Application:**

The accompanying application, and if necessary, an interview of finalists will be used to determine which beneficiaries will be chosen as Foundation grant recipients. It is important that the grant be used for charitable purposes such that the tax-exempt status of the Foundation is not jeopardized.

### **Application and Award Schedule:**

Submittal deadline: **December 9, 2017**

Interview of grant finalists (if necessary): February 2018

Awards announced: April 2018

Awards disbursed: April 2018

Presentation of awards: TBD

**Beneficiary Responsibilities**

Selected beneficiaries will be expected to support the fund raising activities of the Foundation. This support will include attendance at events, volunteers to help put on events, promotion of events and donations of items such as auction items of in kind support of events.

**Use of the Grant and Anniversary Report:**

The Foundation expects that the grant will be used for the application's stated purpose and within 12 months from the time that the grant is received; if not, the Foundation reserves the right to demand return of the grant. For this purpose, the Foundation requires a statement from the responsible person at the 12-month anniversary of the grant receipt of the disposition of the grant funds and the accomplishments of the grant activity.