



Grant Application

Please complete this form by typing in answers in the boxes shown below. Note: the boxes will automatically expand as you type.

Send your completed application and attachments, in PDF form, compressed and on a thumb drive, to: Rotary Club Tulsa Foundation Grants, 616 S. Boston, Suite 410, Tulsa OK 74119-1208. For more information, call 918.584.7642.

Please **attach** the following:

- a) Most Recent Financial Statement/Audit and 990
- b) Current Budget
- c) Current List of Board of Directors
- d) 501(c)(3) Documentation from the IRS
- e) Brochure or Annual Report for the Organization
- f) Relevant quotes and specifications related to your project

Grant Request Deadlines

Applications are accepted from Aug. 1 – Aug. 31.
Approved grants are paid once a year.

Date of this Application

Name of organization:	
Amount requested:	
Items to be purchased:	
Describe who and how many will benefit:	

Contact and title:	
Executive director:	
Chairman of the board:	
Organization address:	
City, state, zip:	
Phone and fax:	
E-mail:	
Web address:	
Tax ID number:	

We agree that this application fairly and honestly represents the needs, governance, and finances of the charitable organization we lead.

Executive Director (Signature)	Chairman of the Board (Signature)	Date
Endorsing Rotarian (Recommended)	Role (<i>e.g.</i> , donor, board, volunteer)	

Please answer the following questions. You may attach additional pages if necessary; please refer to item # below.

A. Please describe the mission of your organization, the year and why you were founded.

B. What services do you provide to the community? How many people are helped yearly?

C. Does your organization benefit youth? If so, please describe how.

D. Will this donation benefit persons living in Tulsa or adjoining counties? If so, how and how many?

E. What other sources of funding are you soliciting for this project?

F. Do you receive funds from the United Way?

G. Is the organization the beneficiary of any endowment, trust, corporation, fund or other assistance not listed on your financial statements attached. Describe in detail.

H. List the dates and dollar amounts you have received in the past from the Rotary Club of Tulsa Foundation.

I. Does your organization employ a staff member who has successfully completed the Oklahoma Center for Nonprofits "Standards for Excellence" program? If yes, indicate the name, title, position and year completed.

J. Does your organization conduct an annual audit? If Yes, include a copy. You DO NOT need to complete the financial statement on the next page.

NOTE: You may submit a different set of financial documents instead of this form if you prefer. Audited or CPA prepared statements are given preference.

Balance Sheet Data as of (date):

Financials

Assets

*Amount (whole \$ -
Totals will calculate)*

Description (if explanation needed)

Cash		
Receivables		
Inventory		
Short-term investments and marketable securities		
Accounts and notes receivable		
Prepaid expenses		
Other current assets		
Prepaid Insurance		
Total current assets...		

Fixed Assets

Amount

Description (if explanation needed)

Land		
Buildings		
Machinery and equipment		
Capitalized leases		
Deferred charges		
Other fixed assets		
(Less Accumulated Depreciation)		
Total Fixed Assets...		

Asset Total

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Current Liabilities

Amount

Description (if explanation needed)

Accounts payable		
Notes payable		
Income taxes currently payable		
Current portion of long-term debt		
Other current liabilities		
Total Current Liabilities...		

Long-Term Liabilities

Amount

Description (if explanation needed)

Long-term debt		
Capital lease obligations		
Deferred income taxes		
Other long-term liabilities		
Total Long-Term Liabilities...		

Equity

Capital funds		
Contributions		
Retained Income		
Equity Total...		

Liability & Equity Total

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Amount

Description

Annual Fundraising

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