



## Chapter Charity Grants & Volunteer Initiatives: 2010

The PLUS Foundation will make available up to **\$4,000 for each PLUS Chapter to allocate to a non-profit charity in their region.** The Foundation will also make available up to **\$1,000 to facilitate a volunteer event** for a non-profit charity.

The goals of this program are:

- to engage PLUS Chapters and members in the philanthropic work of the PLUS Foundation
- to promote the good will of PLUS members and the professional liability industry
- to provide financial support to worthy causes in numerous geographic areas and broaden the giving base of the Foundation
- to encourage and support volunteerism by the PLUS community

The following general criteria will apply to the approval of a Chapter Charity Grant and Volunteer Initiative.

- The organization will be a free-standing 501(c)(3) non-profit corporation with a sound reputation and history of accomplishment. New organizations with little experience and minimal administrative capacity, pools of money collected without corporate oversight, or a project that is part of the government are not preferred.
- The organization will be non-partisan, not closely religiously affiliated, nor discriminate in any way (other than based on need) as to who is eligible for the benefits they administer. We want organizations that nearly everyone, regardless of their personal affiliations and beliefs, will be comfortable supporting.
- The organization will support the PLUS Foundation's and any Chapter fundraising efforts for the charity by providing information and images that will help craft a quality message to potential donors.
- PLUS Foundation staff will do background research on the organization, including direct contact.
- The PLUS Foundation Board of Directors must approve all grants before the organization is notified of an award. All checks will be made payable to the beneficiary. Grants may be split between two charities.

**Volunteer Initiatives:** Please note the following guidelines when considering your nominations.

- The volunteer event will be complete by **September 30**, unless otherwise approved.
- The Chapter may select different charities for the grant and the volunteer initiative. Both efforts may, but are not required to be, targeted to the same charity.
- \$1,000 will be made available to reimburse for pre-approved expenses or direct bills when feasible.
  - Eligible expenses include meals for volunteers, tools/supplies that can be considered in-kind donations left with the charity (ex. paint, brushes, landscaping material, building supplies), or other items pre-approved by staff.
  - Ineligible expenses include travel costs, event fees (fundraising dinners, golf outings, etc.), photography, any items not considered in-kind donations left with the charity, or any items not approved by staff. **Always check with the Foundation office!**
- The Foundation will provide t-shirts for volunteers. This will not count against your \$1,000 budget.

**Additional Fundraising:** All additional fundraising activities must be approved by the PLUS Foundation.

- Additional fundraising will be limited to one Chapter event per year. This can be for cash, items or both.
- All cash and items go directly to the charity. All donation checks must be made out directly to the charity. The Foundation or PLUS will not collect and redistribute money.
- Cash and items can only be requested from individuals, not from companies. Company "sponsorship" of events or activities is not appropriate.



**PLUS Foundation**  
**Chapter Charity Grant & Volunteer Initiative - Nomination Form**

PLUS Chapter: \_\_\_\_\_

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

Address of Main Offices: \_\_\_\_\_

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

Organization's Website Address: \_\_\_\_\_

Suggested Contact Name & Title: \_\_\_\_\_

Contact Phone & E-Mail: \_\_\_\_\_

We Nominate this Charity for: **Chapter Charity Grant** \_\_\_\_\_ **Volunteer Initiative** \_\_\_\_\_ **Both** \_\_\_\_\_  
(Please, use separate forms if nominating more than one charity.)

Organization's Mission/Primary Services (please be brief): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Other Information – if you have access to additional information include it here (ex. year founded, number of people assisted, annual budget, service area, etc.). You may also submit their annual report or other material. This information will be helpful in the expeditious consideration of the charity.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If this nomination is for a Volunteer Initiative, to the extent possible, explain the general activity and timeframe for the initiative. We understand that the details may not be managed until the charity is approved by the Foundation.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Disclosure – please disclose any known substantive personal, familial, business or professional affiliation that any person playing an integral part in your Chapter selection process has with the organization you are nominating:

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Chapter Chair (print): \_\_\_\_\_ Phone & E-Mail: \_\_\_\_\_

Signature & Date: \_\_\_\_\_