



The Florida Society Sons of the American Revolution

Endowment Trust Fund Reimbursement Instructions and Guidelines

A. Timelines for submission of Applications for Endowment Trust Fund Reimbursements

Applications containing grant requests for reimbursement will be accepted by the Endowment Trust Fund (ETF) Disbursement Committee Chairman after January 1 of the calendar year. Applications will not be accepted after November 15 of the same year. Grant requests may include eligible chapter expenses from November 1 of the previous year through October 31 of the current year. All Applications must provide the needed information specified in Section "B" below. Applications cannot pre-date the award/event and applications must be sent to the Committee Chairman as an **e-mail attachment**.

B. Instructions for chapters submitting applications for reimbursement:

1. Each request submitted in an application **MUST be itemized** and include pertinent information including the recipient's name, school or place of employment, date of award, and other criteria used in making the award. Failure to provide such information will cause the request to be pended until such information is provided within the established time lines.
2. Apply for all eligible reimbursable items listed in part B below. Reimbursement will be for the full amount for any approved medals and coins listed in the SAR Official Handbook and **75%** of any other committee approved chapter expenses such as individual certificates, presentation folders, meals, scholarship money, Liberty trees, CAR support, and history fairs. Please show the amount the Chapter paid for the award. The Chapter should not be making a profit on awards reimbursed by the ETF.
3. Medals, Certificates, and other awards, to be eligible for reimbursement, must be awarded in accordance with the rules as described in the Official SAR Handbook. Requests to present medals that may be presented by a chapter with approval of the Florida Society must be submitted to and *approved by the FLSSAR Medals and Awards Committee prior to the event. For awards requiring FLSSAR Medals and Awards Committee pre-authorization will require a declaration by the ETF grant author or Chapter President accompany the grant request for such award that such pre-approval was obtained.*
4. Applications should be for expenses incurred during the award period year of November 1 thru October 31 of the project or award (for example: medals purchased earlier can be reimbursed only in the year awarded).
5. Eligible reimbursement will be limited to \$350.00 per application.
6. Chapters are limited to five (5) applications per year.
7. Chapters may include a tracking code if they wish to have the awards matched to the applications.
8. Fifty percent of all authorized awards will be paid when approved. Payment of the remainder at the end of the year will be prorated and determined by the amount of funds then available.

C. Authorized reimbursement to chapters:

1. Full reimbursement for all ROTC/JROTC (bronze and silver) medals; also one medal per year for the Rumbaugh Oration, Eagle Scout Scholarship, Knight Essay, and the JROTC Chapter Award Complete for the Outstanding Cadet of the Chapter. Full reimbursement for all US Navy Sea Cadet Corps (NSCC) Bronze Good Citizenship Medals. Also, full reimbursement for the Sea Cadet Medal Ribbon Bar which can be purchased along with the Bronze Good Citizenship Medal.
2. Scholarship money for the Rumbaugh, Eagle Scout, JROTC, Knight Essay, and Americanism School Poster contests. Reimbursement Limits: \$50 (1st), \$25 (2nd), \$15 (3rd).
3. Meal for Enhanced JROTC Program Winner, Knight Essay Contest Winner, Eagle Scout Scholarship Winner, and Americanism School Poster Contest Winner; two per recipient (Limit \$20.00 per meal.) Meals for Rumbaugh Oration Contestants two per contestant (Limit \$20.00 per meal.) Meals are not allowed for Bronze and Silver ROTC medal recipients, the Sea Cadet Bronze Good Citizenship medal recipients, or Eagle Scout Recognition recipients.
4. Medals for Law Enforcement, Fire-Safety, Heroism, Emergency Medical Services, Bronze Good Citizenship awards and two

meals per recipient. Other Medals or Certificates purchased from NSSAR and presented to guest speakers and other persons not SAR members, in recognition of their support of the Sons of the American Revolution, persons whose achievements are noteworthy in their school, community or state, or those currently serving or who have served in the Armed Forces of the United States, and two meals per recipient. (Limit \$20.00 per meal.)

5. The SAR Wounded Warrior Certificate and Coin when presented to a non-SAR member of the U.S. Military injured in the line of duty. This is to be presented **ONLY** if the soldier/veteran has been awarded the Purple Heart Medal, and two meals per recipient. (Limit \$20.00 per meal.) (Limit 2 awards per Chapter peryear).
6. Chapters participating in the Habitat for Humanity outreach program may request reimbursement for the purchase of the porch/mailbox flag kits used in the program. *Limit of \$20.00 per porch/mailbox flag kit with a maximum of 15 in a calendar year. Chapters must report the name of each recipient, and the date of each dedication*
7. Support for the Florida Society C.A.R. and local C.A.R. Societies.
8. Genealogical and Historical materials presented to public libraries.
9. Expenses incurred when honoring Revolutionary War Patriot's graves.
10. Copies of historical documents presented to the Public Schools.
11. Restoration of historic and patriotic monuments.
12. History Fairs (Limit \$100.00) and Genealogical workshops (Limit \$200.00).
13. Certificates of Appreciation (*Note: Only for persons providing support for a specific event/project.*), Eagle Scout patches and certificates, Flag Certificates and presentation folder.
14. Liberty Tree Dedication – not to exceed \$150.00 peryear.
15. The chapters are authorized reimbursement not to exceed \$100 per calendar year from the Endowment Trust Fund for purchases of new, tangible, personal property that generates value points as outlined in the U.S. Stark Memorial Report for Resident veterans in nursing homes.

D. Items NOT eligible for reimbursement:

1. Any administrative expense: postage, telephone, correspondence, shipping costs, etc.
2. Frames or framing, other than SAR presentation folders.
3. Any award to SAR members. Any award to animals.
4. Expenses for awards made in previous calendar years (except the previous November and December as noted in the first paragraph above) or projected for future years.

E. Projects which must be submitted to and approved by the BOM:

1. Requests for projects other than those listed above under authorized reimbursements must be submitted to and approved by BOM prior to the event/project.

***Note:** The Endowment Trust Fund Reimbursement Instructions and Guidelines listed above were revised and approved at the FLSSAR Board of Management Meeting on January 25, 2014, and are Effective November 1, 2013.

Application Form Instructions

BEFORE starting on your Endowment Trust Fund Grant Application Form below, please follow the “Save” instructions. Use the “Save to Your PC” button. Add your Chapter’s Name to the front of the Saved file Name.

For example, “**My Chapter ETF Grant Application Form.PDF**”. Now Save this form and **CLOSE** this web page. Then **OPEN** the saved File on your PC to Continue.

Endowment Trust Fund Grant Application

Request Summary:

Chapter tracking code: (optional)

Chapter:

Amount Requested:

Purpose of Grant: Patriotic: Educational: Historical: Charitable

Details: In the space below, provide "specific" information for this grant.

Chapter officer responsible for this project and contact for questions:

Name:

Phone:

Email Address:

Please indicate below where your ETF reimbursement check should be sent:

Name:

Address:

City:

State:

Zip+4:

Financial details:

Total cost of project(s):

Less chapter / member contributions*:

Total amount requested:

***Note: Contributions must be at least 25% of the cost of the above reimbursable items other than medals.**

Certification:

I do hereby affirm that the above statements are true and complete; that all Endowment Trust Fund money received will be used to help pay for the completed Chapter project detailed above; and that no funds will benefit any individual.

Chapter Officer Signature:

Date signed:

The typed signature above is my authorized signature.

Email Address:

Committee Use Only:

Approve

Disapprove

Amount:

Date:

Committee Chair:

Committee Request #:

The typed signature above is my authorized signature.

Committee Calculations:

E-mail the "renamed" form as an Attachment to the Chairman of the FLSSAR Endowment Trust Fund Disbursements Committee.

Please request a "Read Receipt" so that you will know that email was received.

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