



The Florida Society Sons of the American Revolution

Endowment Trust Fund Reimbursement Instructions and Guidelines

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 A. below. Applications cannot pre-date the award/event.

FILL OUT ETF GRANT APPLICATION FORM ELECTRONICALLY

1. On the “Documents Page”, open the ETF Grant Application Form. It is listed as ***Electronic Form*** PDF document.
2. **Save the PDF document** to your PC. Go to ‘File’ ‘Save As’ with an appropriate name, e.g., (chapter name)-ETF-(date).doc ; and then save it where you can find it later such as in you’re ***My Documents*** folder.
3. **Fill out form** by using your TAB key (forward) or SHIFT-TAB keys (backward) to maneuver between data fields.
4. When finished ‘Save’ your document one last time; ‘Close’ or exit the document.
5. **Send the file via e-mail attachment** to the ETF Disbursement Committee Chair.

A. Instructions for chapters submitting applications for reimbursement:

1. Applications must be submitted on official FLSSAR forms (see above).
2. Each request submitted in an application **MUST** be itemized and include pertinent information including the recipient’s name, school / place of employment, date of awarded, 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. 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.
3. Apply for all eligible reimbursable items listed in part B below. Reimbursement will be for the full amount for any approved medals 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.
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.

B. 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.
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, Rumbaugh, Knight, and Eagle Scout winners; two per recipient. (Limit \$20.00 per meal.) Meals are not allowed for Bronze and Silver ROTC 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 purchased from NSSAR and presented to persons other than 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. 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.
6. Support for the Florida Society C.A.R. and local C.A.R. Societies.
7. Genealogical and Historical materials presented to public libraries.
8. Expenses incurred when honoring Revolutionary War Patriot's graves.
9. Copies of historical documents presented to the Public Schools.
10. Restoration of historic and patriotic monuments.
11. History Fairs (Limit \$100.00); Genealogical workshop (Limit \$200.00).
12. Certificates of Appreciation (*Note: Only for persons providing support for a specific event/project.*), Eagle Scout patches and certificates, Flag Certificates and presentation folder.
13. Engraving expenses – not to exceed \$5.00 per award.
14. Liberty Tree Dedication – not to exceed \$150.00 per year.
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.

C. Items NOT eligible for reimbursement:

1. Any administrative expense: postage, telephone, correspondence, 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.

D. 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 October 14, 2016, and are Effective October 14, 2016.