Suggestions for completing the Endowment Trust Fund Grant Application

Please note that the below are strictly **supplemental** instruction suggestions. They are **not** part of the Official Instructions and Guidelines, but are being issued by the Endowment Trust Fund Disbursements Committee strictly as an aid, especially to compatriots that may be new to completing these applications. Grant Applications that are submitted must follow the published Endowment Trust Fund Reimbursement Instructions and Guidelines. Failure to provide all the information specified will cause your chapter request to be pended until such information is provided within the established time lines. Remember, your Chapter should **not** be making a profit on awards reimbursed by the ETF, so please use the sale price if the awards were purchased on sale Also, please do not mark up what your chapter paid for meals, but tips can be included. In some cases, providing the NSSAR Stock Number for an award might remove some confusion.

Please remember to keep your copy of Adobe Reader up to date. Check for updates frequently and visit the Adobe website at http://www.adobe.com/products/reader.html to make sure you are using the current version. Remember, Adobe Reader is **FREE**, so take a little time to keep it up to date.

As more FLSSAR Chapters start submitting applications, we need to be aware that amount of funds available for disbursements are limited to the income of the trust. This means that all applications may be reimbursed less than the Disbursements Committee has approved.

The Committee would suggest: To make completing applications easier, each chapter have one officer keep a running spreadsheet of all costs. If a record is kept showing who, what, why, when, and where, then completing an application should be much easier, less time consuming, and more accurate. We have been informed that some chapters have their various committees complete our applications. Please use caution, because this could result in submitting more than the allowed number of applications or not applying for some items that could have been expensive to the Chapter.

Please remember that the Committee is here to help your Chapter get money back into your Treasury. Call or email us with any questions – we are here to help.

1. **Request Summary:** This is where you would list what the request is for. It may be for only one event such as JROTC, or it could be for more than one event such as JROTC, Eagle Scout, Law Enforcement, Fire and Safety. Please list briefly what the request is covering.

2. **Chapter Tracking Code:** This is your Chapters code to make it easier to track your requests. Many chapters use the year followed by the request number. Example: 2013-1

3. **Chapter:** The name of your Chapter

4. **Amount Requested:** The amount your Chapter is requesting.

5. **Purpose of Grant:** Check the box or boxes that best describe your request.

6. **Details:** Repeating Instruction B-1: 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. The following are examples from prior request forms with sample calculations. The calculations do NOT have to be shown on the form however the submitter should be doing the calculations in order to

complete the form correctly. The calculations are done below so the chapter can see how the ETF Disbursements Committee performs the calculations. The Total Amount Allowed in the calculations is what the Chapter could receive if the Trust Fund could pay out 100%, which is unlikely:

a) At our May 21, 2011 meeting the chapter presented 3 Law Enforcement Commendation Medals w/ Certificates @ $20.00 each and 3 Certificate Presentation Folders @ $1.00 each. These were presented to the famlies of three fallen St. Petersburg Police Department Jeffery Yaslowitz, David Crawford, and Thomas Baitenger. Total Chapter Costs - $63.00

Awards	**Total**	**Allowed**
3 Law Enforcement Medals	$60.00	
3 Certificate Presentation Folders	$3.00	$3.00
Total Cost	$63.00	$3.00
		75%
		$2.25
Medals at 100%		$60.00
Total Amount Allowed		$62.25
Chapter Contribution		$0.75

b) At our April 8, 2011 Luncheon meeting, we presented a medal for Heroism award to each of the following Deputies of the Manatee County Sheriff's Department: Deputy Bryce Meade, Deputy Michael Gerholdt, and Deputy John Lawson. They were accompanied by their Supervisor, Captain Kris Kennedy who told those attending the luncheon why they were deserving of this award. Our out of pocket expenses included: three Medals for Heroism and Certificates @ $20.00 each, three Certificate Presentation Folders @ $1.00 each, and Four Lunches @ $20.00. Total Chapter Costs - $143.00

Awards	**Total**	**Allowed**
3 Medals for Heroism	$60.00	
3 Certificate Presentation Folders	$3.00	$3.00
Meals for Above Awardees and One Guest	$80.00	$80.00
Total Cost	$143.00	$83.00
		75%
		$62.25
Medals at 100%		$60.00
Total Amount Allowed		$122.25
Chapter Contribution		$20.75

c) At our March 11, 2011 luncheon meeting, we presented five Fire and Safety Commendation Medals with Certificates. These awards were presented to; Captain Doug Wolf - Sarasota County, Acting Lieutenant Ryan Jekonski - Sarasota County, Firefighter/EMT Richard Yarnall - North Port, Firefighter-Paramedic Jay Gosnell - Longboat Key, and Firefighter Matthew McCabe – Bradenton. The award recipients were accompanied by their supervisors who told those at the luncheon why they were deserving of this award. Our out of pocket expenses included: five Fire Safety Commendation Medals with Certificates @ $20.00 each, five Certificate Presentation Folders @ $1.00 each, and nine Lunches @ $20.00 each. Total Chapter Costs - $285.00

Awards	**Total**	**Allowed**

5 Fire Safety Medals	$100.00	
5 Presentation Folders	$5.00	$5.00
9 Lunches	$180.00	$180.00
Total Cost	$285.00	$185.00
		75%
		$138.75
Medals at 100%		$100.00
Total Amount Allowed		$238.75
Chapter Contribution		$46.25

d) At our November 12, 2011 Luncheon meeting, our Rumbaugh Oration Contest winner Braden Causey, a 16 year old junior from Bayshore High School, was presented with a Scholarship award from our Chapter. She was accompanied by her High School English Teacher, Lori Ladd. Our out of pocket expenses included: Prize Money 1st place $600.00 and two Lunches @ $20.00 each. Total Chapter Costs - $640.00.

Awards	**Total**	**Allowed**
Rumbaugh Scholarship	$600.00	$50.00
2 Lunches	$40.00	$40.00
Total Cost	$640.00	$90.00
		75%
		$67.50
Medals at 100%		$0.00
Total Amount Allowed		$67.50
Chapter Contribution		$572.50

e) At our February 19, 2011 luncheon meeting, we presented Daughter of Liberty Medals to Elaine Crapo and Mary Tarpley for their dedicated service to SAR. Our out of pocket expenses included: two Daughter of Liberty Medals @ $20.00 each, and two Certificate Presentation Folders @ $1.00 each. Total Chapter Costs - $42.00.

Awards	**Total**	**Allowed**
2 Daughters of Liberty Medals	$40.00	
2 Presentation Folders	$2.00	$2.00
Total Cost	$42.00	$2.00
		75%
		$1.50
Medal at 100%		$40.00
Total Amount Allowed		$41.50
Chapter Contribution		$0.50

f) On September 21,2011 the SAR Saramana Chapter conducted a Liberty Tree Dedication Ceremony at Patriots' Park located in Venice, Florida. Guest speakers consisted of Sarasota County Commissioner Joe Barbetta, Venice Mayor John Holic, and Carolyn Brown from the Sarasota County Parks & Recreation Department. Our out pocket expenses included: one Live Oak tree $150.00 and an engraved stone $230.00. Total Chapter Costs - $380.00.

Awards	**Total**	**Allowed**
Liberty Tree Dedication	$380.00	$150.00
Total Cost	$380.00	$150.00
		75%
		$112.50

Medals at 100%	$0.00
Total Amount Allowed	$112.50
Chapter Contribution	$267.50

g) At our October 7, 2011 Luncheon meeting, we presented a Bronze Good Citizenship Medal with Certificate to Pat McLain for her on going support of the SAR sponsored programs. We also presented Jennifer Turner, Senior Society President of the Chichi-Okobee chapter of CAR with a Certificate of Appreciation and a SAR Coffee Mug for being our Guest Speaker at the meeting. Jennifer brought the attendees up todate on the Activities of the Chichi-Okobee Chapter of C.A.R. Our out of pocket expenses included one Bronze Good Citizenship Medal with Certificate @ $15.00, one Certificate of Appreciation @ $3.00, a SAR Coffee Mug @ $9.00, two Certificate Presentation Folders @ $1.00 each. Total Chapter Costs - $29.00.

Awards	**Total**	**Allowed**
1 Bronze Good Citizenship Medal	$15.00	
1 Certificate of Appreciation	$3.00	$3.00
1 SAR Coffee Mug	$9.00	$0.00
2 Certificate Presentation Folder	$2.00	$2.00
Total Cost	$29.00	$5.00
		75%
		$3.75
Medals at 100%		$15.00
Total Amount Allowed		$18.75
Chapter Contribution		$10.25

h) At our January 14, 2011 luncheon meeting and our May 20, 2011 luncheon meeting, we presented our Flag Certificates. The recipients were: Emeritus at Colonial Park, Live Oaks Manor, and Tarpon Towers LLC. Our out of pocket expenses included: three Flag Certificates @ $3.00 each, and three Presentation Folders @ $1.00 each. Total Chapter Costs - $12.00.

Awards	**Total**	**Allowed**
3 Flag Certificates	$9.00	$9.00
3 Presentation Folders	$3.00	$3.00
Total Cost	$12.00	$12.00
		75%
		$9.00
Medals at 100%		$0.00
Total Amount Allowed		$9.00
Chapter Contribution		$3.00

i) At our May 20, 2011 luncheon meeting, we presented to JROTC Cadet Major Staci Macias of Hardee Senior High School the SAR JROTC Chapter Award Complete, including a bronze medallion, neck ribbon, framed bar with a bronze star and a Certificate. She also received a Scholarship Award of $600.00 from our Chapter. She was accompanied by her parents and William Brockman, Dean of Students, from the Sarasota Military Academy, who was our guest speaker at the luncheon. Prior to this luncheon, we had presented at various schools in our two county area, four Bronze JROTC Medals with Certificate and Bars. The Cadets, High School, and dates presented are; Cadet Bradley R. Collins - Sarasota Military Academy - 04/21/11, Cadet Second Lieutenant Brian D. Smith - Riverview High School - 05/18/11, Cadet Second Lieutenant Shayne Williams - Lakewood Ranch High School - 05/19/11, Cadet Kyle Kelly - Venice High School - 05/19/11. William Brockman was presented with a

Certificate of Appreciation for being the guest speaker at the luncheon. Our out of pocket expenses included: $600.00 Scholarship award, JROTC Chapter Award Complete @ $30.00, four Bronze JROTC Medals w/certificate and bar @ $9.50 each, one Certificate of Appreciation @ $3.00, six Certificate Presentation Folders @ $1.00 each, and two Lunches @ $20.00 each. Total Chapter Costs - $717.00.

Awards	Total	Allowed
JROTC Scholarship Award	$600.00	$50.00
JROTC Chapter Award Complete	$30.00	
4 Bronze JROTC Medals	$38.00	
1 Certificate of Appreciation	$3.00	$3.00
6 Certificate Presentation Folders	$6.00	$18.00
2 Lunches	$40.00	$40.00
Total Cost	$717.00	$111.00
		75%
		$83.25
Medal at 100%		$68.00
Total Amount Allowed		$151.25
Chapter Contribution		$565.75

j) The Chapter presented a number of Eagle Scout Printed Certificates during the year at the Eagle Scouts Court of Honor. Those presented were; Charles Frederick Elzer IV for 2/6/11 ceremony, Dillon Kelley for 5/16/11 ceremony, Zachary Nichols for 5/16/11 ceremony, Marc H. LaBarre for 9/24/11 ceremony, and Nicholas J. Nocera for 9/24/11 ceremony. Our out of pocket expenses included: five Eagle Scout Printed Certificate @ $0.25, five Certificate Presentation Folders @ $1.00 each. Each Eagle Scout, Scoutmasters and other in attendance also received the Eagle Scout Pamphlet which describes the Eagle Scout Scholarship Contest. Total Chapter Costs - $6.25.

Awards	Total	Allowed
5 Eagle Scout Printed Certificates	$1.25	$1.25
5 Presentation Folders	$5.00	$5.00
Eagle Scout Pamphlet	$0.00	$0.00
Total Cost	$6.25	$6.25
		75%
		$4.69
Medal at 100%		$0.00
Total Amount Allowed		$4.69
Chapter Contribution		$1.56

7. **Chapter officer responsible for this project:** In the case of multiple events on one Application, you could list one Chapter Officer such as the President or Treasurer. Another option would be to list all Committee Chairman and their responsibility, such as; James Johnson, JROTC. Dave Hull, Flag Certificates. Herman Smith, Law Enforcement & Heroism. Phone: (941) 966-0493 for Chapter Secretary.

8. **Please indicate below where your ETF reimbursement check should be sent:** This is IMPORTANT. The Treasurer of the Endowment Trust Fund needs this information in order to have the Chapters check sent to the correct Chapter Officer with his correct address.

9. **Financial Details:** This will be your Chapters calculations. Please show the total chapter cost of the project(s), less your chapter / member contributions, and the total amount your chapter is requesting.

10. **Certification:** The chapter officer completing the Endowment Trust Fund Grant Application needs to type in their name, their chapter title and their e-mail address. They are thereby agreeing that "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."

Please do **NOT** delay in submitting your Endowment Trust Fund Grant Application. Our submission deadline is firm, as we need to have adequate time to review the application request. If we receive your application early and find errors, we can contact you and suggest changes or additions to make the application request acceptable. If we receive your application late, then you might not have time to make any changes, and the entire application could be rejected.

When you e-mail your completed Endowment Trust Fund Grant Application, ask the Committee Chairman to please respond so you have a record of its receipt by the Committee.

Please check back with the Endowment Trust Fund Disbursements Committee Chairman if you have not heard anything in a reasonable time frame. The person in your Chapter designated to receive the check from the Treasurer of the Endowment Trust Fund needs to keep others informed if the check is not received in a timely manner.

Communication is the key to preventing a Grant Application from falling through the cracks and not being acted upon. We are all human and mistakes can occur.