

# Beaufort Ole Towne Rotary Club Community Service Committee

## Policies and Procedures for Donations

Revised March 2017

### **Objective:**

An objective of The Community Service Committee is to encourage and foster the ideals of service above self as a basis of worthy enterprise. The four phases of Community Service include devising and carrying into effect plans which will guide and assist members in:

1. Human Development-dealing within the community with the welfare of human beings of all kinds throughout the whole span of life by providing assistance and support to those in need.
2. Community Development-working to make our community a better place to live by improving the physical condition of the community and its facilities.
3. Environmental Protection-encouraging the improvement of the quality of the community's environment.
4. Partners in Service-building relationships with other Rotary sponsored organizations within the community and in cooperating with them in service.

To promote this objective, the Beaufort Ole Towne Rotary Club will make donations and contributions to worthwhile causes, individuals, and organizations.

### **General Policy:**

The Beaufort Ole Towne Rotary Club is a service Club committed to serving others. Donations and contributions will be made according to the following guidelines and within the limits of the Club's budget and finances. Two months prior to fiscal year-end, the treasurer and incoming president will make a budget to be approved by the Board and then presented to the club. The budgeting process will include an estimate of the amount of funds that will be available during the coming year for donations and contributions to worthy individuals and organizations.

### **Qualifications:**

Any organization or individual may request a monetary contribution. The following will be considered when evaluating the merits and amount of any contribution:

Contributions may be requested:

- To support local individuals and local community projects only.
- For local educational programs.
- To assist locals in hardship and disaster cases.
- Based on local need.
  - \*based on the number of local individuals benefited
  - \*based on benefit to our local community

Contributions will not be made to the following:

- \*Governments
- \*Individuals without demonstrated need
- \*Projects without long term benefit
- \*Projects that provide only publicity to the Club
- \*Political organizations
- \*Organizations or individuals without a defined objective, purpose, and/or goal.

**Request Evaluation:**

Recommendations for funding will be evaluated based on the following criteria:

- Type of individual or organization
- Need, project merits
- Long term benefits
- Rotary recognition
- Number of persons benefited
- Other possible support
- One time contributions vs on-going support
- past contributions to individuals or organizations (3 consecutive year limit)
- Possibility of Rotary Participation
- Reputation and stability of the requesting individual or organization

**Procedures:**

1. Individuals or organizations wishing monetary contributions from the Club must submit all requests in writing, completing the "Community Grant Application" and a cover letter to the Community Service Chair
2. The Community Service Committee will review the applications twice a year; October - November and February - March . The Community Service Committee will review the application and will make a recommendation to the Club's Board of Directors. The recommendation will include whether or not to make a contribution and the amount.
3. The Board of Directors will consider the recommendations at their next regularly scheduled meeting. Based on the recommendation of the Community Service Committee, the annual budget and the current financial condition of the Club, the Board of Directors will make the decision as to whether to support the request for funding and the amount. The decision of the Board of Directors will be final.
4. Once the Board decides to award or deny the request, The Community Service Committee Chairman will notify the individual or organization. Checks will be sent within 30 days of approval.
5. Acceptance of the funds by the individual or organization indicates funds will be used as outlined in the grant request.

The Community Service Committee will comply with the above procedures, time frame, and schedules. However, in the event that an applicant is unable to complete the application within the

described time schedule or far enough in advance of date the funds are needed; efforts will be made to expedite the application through the process.

All donations must be consistent with the following Rotary Club 4-way test:

1. It is the truth?
2. It is fair to all concerned?
3. Will it build good will and better friendships?
4. Will it be beneficial to all concerned?

**Please include the following information in your application:**

1. Date of Submission:
2. Organization or individual requesting funds:
  - a. Contact person:
  - b. Address:
  - c. Phone number(s):
  - d. Email:
  - e. Is the organization a 501-c(3)?
3. Brief description of project: Summarize the proposed project. Describe the target group, what will happen, when, and where it will occur.
  - a. Who and how many people will benefit:
  - b. If this is a capital building expenditure, describe how the equipment will be used and how will upkeep and replacement parts be funded
  - c. Time frame for project...start and end dates:
4. Recognition and benefit to the Beaufort Ole Towne Rotary:
5. Plan for feedback to the Beaufort Ole Towne Rotary:
6. Total cost of project (itemize expenses):
  - a. Amount requested from Beaufort Ole Towne Rotary:
  - b. Other sources of funding:
  - c. How would partial funding impact this project/program?
7. Describe how the project's success will be evaluated.
8. Has this organization ever applied for funds from this Rotary before? If so, please indicate the amount of funds received, the date received, and for what purpose the funds were used.
9. The check should be made payable to:
  - a. The check should be sent to:

**Applications shall be submitted during Fall (Oct. - Nov) or Spring (Feb. - Mar.) grant cycles. Decisions on applications for funding will be returned to the applicant in writing at the end of the grant cycle.**

Please submit applications to: Community Service Committee Chair, Beaufort Ole Towne Rotary  
PO Box 737  
Beaufort, NC 28516

On-line at [botr@beaufortoletownerotary.com](mailto:botr@beaufortoletownerotary.com)

If any questions please contact the Grant Chairperson at [botr@beaufortoletownerotary.com](mailto:botr@beaufortoletownerotary.com).