Funding Guidelines

Rotary Club of Washington, Missouri

P.O. Box 85

Washington, MO 63090-0085

Board of Directors Meetings are Regularly Scheduled for the Second Monday of Each Month.

The Fiscal Year of the Club Starts July 1st and Ends June 30th.

Additional Information about Rotary is Available at:

www.rotary6060.org

www.rotary.org

Rotary Club of Washington Missouri

District 6060 <> Club 2353

Guidelines for Funding Requests

Preamble

The Rotary Club of Washington Missouri strives to demonstrate a commitment to the Rotary International motto of "*Service Above Self*" by partnering with and contributing to worthwhile organizations and causes within our community.

While Rotary is a truly international organization, these guidelines are intended to address funding requests for projects within or near our local community, which we define as the area within the geographical boundaries of the Washington Public School District.

Our community is greatly benefitted by a multitude of individuals and groups working on a wide range of worthy causes serving a wide demographic of needs and quality of life issues. These guidelines are intended to assist organizations and individuals seeking the Club's financial assistance to provide the type and scope of information we believe will be most helpful to our board of directors as they deliberate how best to allocate available and anticipated funds.

Funding Requests will be accepted by any member of the Club's Board of Directors and presented to the Club President for inclusion on the next Board Meeting Agenda. For each funding request, the outcome of this review will be one of the following:

1) immediate approval of the request by the Board of Directors

   (Club Policy delegates direct authority to the Board to approve Funding Requests for amounts up to $2,500)

2) immediate denial of the request by the Board of Directors

3) request to provide additional information to the Board of Directors.
   (This will defer further action to the next monthly Board meeting)

4) request for a formal presentation to the Club Membership
   (This will defer further action to the next monthly Board meeting

5) recommendation of funding proposal to the Club Membership
   (Club Policy requires a vote of the Club Membership for Funding Requests for amounts over $2,500)

Entities requesting funding should provide the following information for Board consideration.

1) The name, address and federal tax ID of the organization, whether or not the organization has a 501(c) designation, and if so, the 501(c) designation: (501(c)(3), 501(c)(4), 501(c)(6), etc.)

2) The names and comprehensive contact information for at least two members of the organization most familiar with the funding request.

3) A list of the organization's Board of Directors.

4) A description of the project or program to be funded, including the dates for which service will be provided, the number of individuals to be benefitted, any specific demographics to be benefitted (i.e., children, the disabled, veterans, the elderly, the economically disadvantaged, the medically under-served, etc.), the geographic service area to be served.

5) The amount of funding being requested from the Rotary Club of Washington, the percentage of total project funding requested from Rotary, and a proposed schedule of funding or period over which funding may be made. (i.e., immediate one-time funding, $X,XXX per year for X years, etc.)

6) A complete budget detailing income and expenses of the project or program for the period in question. Include a detailed explanation of administrative costs.

7) Plans for future periods (i.e., is this a one-time project or program?, will Rotary be asked for ongoing financial support?, if the program is expected to be ongoing, are there plans for it to become financially self-sufficient?, if so, how?)

8) A copy of the organization's most recent IRS Form 990 if required to be filed, or, if not, a complete Balance Sheet and Statement of Revenues and Expenses or their functional equivalents for the most recently completed fiscal year.

9) A description of the organization's public support. (number of volunteers and number of donors during the most recent fiscal year.)

10) Opportunities for public recognition of contributions (planned press releases, sponsorship opportunities, etc.).

11) Dependency on Rotary funding. (If this funding request is denied, will the project or program definitely be canceled, definitely proceed anyway, or have an uncertain future? If uncertain, explain what other steps will be taken before a determination of viability can be made.) Please provide details for other sources of funding being sought.

12) Please provide any relevant literature describing the project or program.

13) If provided funding, would you be willing to provide an accounting of sources and uses of project funds?