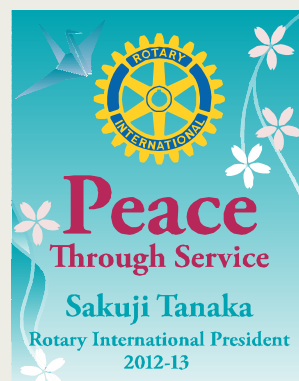


**Rotary Club of Cobourg**  
Charter 997 (1921)  
District 7070  
[www.cobourgrotary.ca](http://www.cobourgrotary.ca)

# Projects & Events Committee Guidelines



# ROTARY CLUB OF COBOURG

## Community Projects and Events Committee

### PROGRAM GUIDELINES

*A guide to the Rotary Club of Cobourg's Community Projects and Events Committee's Funding Criteria, Eligibility, Process and Checklist*

All applicants are encouraged to read this publication before completing a Funding Application Form.

#### **About Rotary**

Rotary is a worldwide organization of more than 1.2 million business, professional and community leaders. Members of Rotary clubs, known as Rotarians, provide humanitarian service, encourage high ethical standards in all vocations, and help build goodwill and peace in the world.

There are 33,000 Rotary clubs in more than 200 countries and geographic areas. Clubs are nonpolitical, nonreligious and open to all cultures, races and creeds. As signified by the motto *Service Above Self*, Rotary's main objective is service; in the community, in the workplace and throughout the world.

#### **Mission**

The mission of Rotary International is to provide service to others, promote integrity, and advance world understanding, goodwill and peace through the fellowship of business, professional and community leaders.

#### **The Four Way Test**

The test, which has been translated into more than 100 languages, asks the following questions:

- i.) Is it the TRUTH?
- ii.) Is it FAIR to all concerned?
- iii.) Will it build GOODWILL and BETTER FRIENDSHIPS?
- iv.) Will it be BENEFICIAL to all concerned?

#### **Source of Funding**

The Rotary Club of Cobourg has a membership of over 150. Each year the club raises funds through its many activities in the community which include:

- i.) The Cobourg Waterfront Festival (Canada Day Weekend);
- ii.) Sportsman's Night and Gourmet Dinner (First Friday in February)
- iii.) Northumberland Ribfest at Victoria Park (Mid August)

#### **Objectives of the Community Projects and Events Committee**

The objectives of the Community Projects and Events committee is to identify, promote and monitor suitable projects and initiatives in Cobourg and surrounding communities which merit support by the Rotary Club of Cobourg.

### **The Goals of the Committee**

- i.) To improve life, participate in common purpose programs, activities and opportunities with emphasis on early stage, short-term “seed money” needs.
- ii.) To foster interaction between the club and the residents of Cobourg and surrounding communities
- iii.) To create/enhance a positive image of Rotary

### **Funding Criteria**

Funding priorities include

- Health and Wellness
- Education and Literacy
- Community Development (encompassing, as an example, youth, the elderly and society’s disadvantaged)

### **Eligibility Requirements**

- The applicant will be community based, volunteer driven, a charitable or not-for-profit organization
- Applicants will demonstrate commitment to the project through the investment of their own funds and resources.
- Collaborative partnerships are desirable where possible
- The project will build on community strengths and assets, utilizing community skills, knowledge and experience as appropriate.
- In addition to completing Funding application forms, a successful applicant will be required to submit a final report providing a results oriented summary of the initiative and verification that the funding was used for the approved purpose.
- The successful applicant will be required to recognize the Rotary Club of Cobourg’s support for the initiative, both to its membership and the public, in a manner approved by the Rotary Club of Cobourg and formalized in the Letter of Agreement.

### **Not Eligible for Funding**

Those funding applications for the following purposes:

- Current operating expenses, deficits, for-profit activities, political activities and retroactive requests
- Initiatives that require Rotary funding on a continuing annual basis. This does not preclude the applicant from making new and different submissions each year.

### **Funding Application Forms**

May be downloaded from Rotary Club of Cobourg’s web site; [www.cobourgrotary.ca](http://www.cobourgrotary.ca) or obtained by contacting the Rotary Club of Cobourg’s Secretary at P.O. Box 882, Cobourg ON K9A 4S3. Email address: [secretary@cobourgrotary.ca](mailto:secretary@cobourgrotary.ca).

### **Attachments Required with Application**

- Letter signed by Board Chair, Project Manager, CEO or Executive Director formally requesting Rotary's support and describing the proposed undertaking in detail, including plans, goals, objectives, anticipated start and end dates and the importance to the community
- Budget for the proposed initiative, past year-end financial statements, and current year-to-date financial statements.
- A minimum of two price quotes for any material or services to be purchased.
- The manner in which Rotary's support will be recognized

### **Deadline for Funding Request Submissions**

Funding requests should be forwarded to the Rotary club of Cobourg in sufficient time to meet the following deadlines"

**September 1<sup>st</sup>**

**November 1<sup>st</sup>**

**March 1<sup>st</sup>**

It should be noted that when an application is received, it goes through an extensive review process, and the time frame for a decision on a funding application may take up to 120 days from deadline date.

### **Application Review Process**

The people and process involved in the review of a funding application are:

- Step 1** Application is received by the Club Secretary who directs the request to the appropriate Rotary Club of Cobourg committee
- Step 2** Committee chair, or an appointed member of the committee, checks to see that the organization and its submission meet the basic eligibility requirement and that the application is complete and includes the necessary documentation
- Step 3** A committee member or members are appointed to review and investigate the application
- Notifies the applicant if the submission is incomplete or lacking necessary attachments
  - May seek additional information from the applicant or discuss ways of refining the proposal
  - May contact external advisors having expertise in the field, other funders and people or groups, who may be impacted by the project. Rotary considers the application to be generally confidential; but may share information relative to the submission with external advisors and other funders
  - Will assess the applications
  - May arrange a site visit to discuss the application with representatives of the submitting organizations
  - Decide if the proposed undertaking is the best use of the Club's funds; and whether the applicant is the appropriate body to carry it out.
- Step 4** A presentation is made by the review team to the Projects and Community Events Committee, together with a recommendation for full funding, partial funding, or that the application be declined

- Step 5** For the application to be approved for funding, a *Motion of Approval* must first be passed by a majority of the committee; and depending on the size of the funding amount, further approval may be required from the Club Executive or the club as a whole.
- Step 6** If an application is approved, the applicant will receive a *Letter of Agreement*. If an application is declined, the applicant will receive written notification, together with a suggestions that the applicant discuss the reason for the decline with their contact member of the community Projects and Events Committee. In any event, the Rotary Club of Cobourg will make every reasonable effort to advise the applicant of the club's decision at the earliest opportunity.

### **Recognition and Reporting Requirements**

#### ***Letter of Agreement***

After funding has been approved, a *Letter of Agreement* is sent to the applicant listing any terms and conditions associated with the funding approval. The letter of notification will form a legally binding contract after it has been signed by someone with the legal authority to bind the organization. When the signed agreement has been returned to the Rotary Club secretary, the funding will be made available to the organization provided that any special conditions contained in the *Letter of Notification* have been satisfied. It should be noted that the organization receiving the funds raised from the Rotary Club of Cobourg, is accountable for the disbursement of those funds.

#### ***Recognition Requirements***

Public recognition of the funding, and the activities it supports, is an important way for the organization receiving the support, as well as the Rotary Club of Cobourg, to tell other people about the work being done with Rotary support, while demonstrating openness and accountability about how funds raised by Rotary Club of Cobourg are spent.

#### ***Reporting Requirements***

All funding recipients are required to report on the work for which they received funding. The *Letter of Notification* will specify when a report is due. Failure to submit a "post sponsorship survey" may have an impact on the ability of an organization to receive future Rotary funding. Committee members review all reports and may request further information if they have questions or concerns.

**ROTARY CLUB OF COBOURG**  
**Community Projects and Events Committee**

**FUNDING APPLICATION FORM**

**General Information**

Name of Organization \_\_\_\_\_

Address \_\_\_\_\_

Contact Person and Position \_\_\_\_\_

Phone: . Day \_\_\_\_\_ Evening \_\_\_\_\_ Cell \_\_\_\_\_

Email Address \_\_\_\_\_

**Project or Event Information:** Please give a brief description of the proposed initiative with comment on your plans including goals, objectives, and importance to the community. Please refer to **Program Guidelines**

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Project start date \_\_\_\_\_

Completion date \_\_\_\_\_

Amount of funding requested \_\_\_\_\_

Date required \_\_\_\_\_

Total fundraising goal \_\_\_\_\_

Have you received any funding from any Rotary Club in the past; if so:

Purpose of funding \_\_\_\_\_

Date of Funding \_\_\_\_\_



**Financial Information**

**i.) Financial Statements**

Please provide a copy of your past year-end financial statements, current year-to-date statements and budget for the proposed initiative.

**ii.) Funding Partners**

If you are partnering or approaching other funding sources on this project, please list your partners, all your funding sources, (government-corporate-service clubs-private-etc.), including their commitment status, (tentative, committed), and financial and/or in-kind contribution.

Name	Amount	Type of contribution	Status

**Attachments to Application**

Please refer to the Program Guidelines as additional information must be forwarded with this funding application; i.e. a minimum of two price quotes for any material or services to be purchased, a letter from the organization’s executive formally requesting Rotary’s support, etc.

**Contribution agreement**

By submitting this application I affirm:

- i.) That the information contained in this application is true and accurate to the best of my knowledge
- ii.) That should Rotary agree to provide for this proposed initiative, I will comply with all conditions contained in the Letter of Agreement, including any sponsorship recognition required by rotary, and the provision of a results oriented summary report for the Initiative at its completion

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_

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**Please submit documentation to:**

**Rotary Club of Cobourg, P.O. Box 882, Cobourg, ON K9A 4S3**

**Email address: secretary@cobourgotary.ca**