



Funding Criteria

21 March 2019

1. Projects that target at least one of the Social Enterprises below.
2. Projects that will promote the brand of Rotary in the community.
3. Projects that maximize the long term impact in the community.
4. Projects that leave a tangible asset in the community, preferably with the Rotary name and logo attached where feasible.
5. Projects that require Rotary members to provide hands-on assistance.
6. Projects that visibly demonstrate the care for, or advancement of, vulnerable or at-risk groups. These benefits will be measured and reported by the funding recipient.
7. The recipient needs to be able to measure and demonstrate the benefit to be realized for the money donated.

Social enterprises of the funded project

Promote peace

Fight disease

Provide clean water, sanitation, and hygiene

Save mothers and children

Support education

Alleviate poverty

Reduce homelessness

Support local economies, particularly in third world countries

Process for project funding approval

Individual club members will canvass the parts of the community with which they are familiar to identify potential projects to be considered.

The responsibility of the Director/Community (DC) is to coordinate the various potential projects that the club members have identified from around the community. His/her role is NOT to be responsible for identifying these opportunities him/herself. This process will only be as successful as our members are at fanning out throughout the community, identifying potential projects from around Kelowna, and putting successful applications in front of the Board.



Whenever a club member identifies a potential new project, s/he will discuss it with the DC to ensure that it satisfies the criteria and purpose stated above. Assuming that it does so, the representative of the community organization will, with the help of the liaison, write a proposal for the Board's consideration. The necessary contents of this proposal are contained in another document.

Before the start of the fiscal year (that is, July 1), the club's Treasurer will ensure that a budget has been produced and approved. This budget will include all expected sources of revenue for the coming year as well as all expected uses of those funds for the next twelve months, and, in some cases, beyond twelve months. This budget will be consulted every time a potential new project is being considered by the board. At regularly scheduled Board meetings, the DC will present any new applications that have been completed since the last board meeting. The DC will ensure that the related documentation is in the hands of all board members not less than five calendar days prior to the meeting. The Board's responsibility will be to review the application prior to the meeting, come prepared to ask questions or table concerns, and to do one of three things – either approve the request as it stands, to disapprove it, or to request more information from the DC and/or liaison to be presented at the next Board meeting.

Once a project has been approved, it is the responsibility of the liaison (not the DC) to ensure that the money gets spent in a responsible manner, that the funded organization lives up to any and all commitments that it has made throughout the application process, and to ensure that the funded organization completes its measurement and reporting of actual versus expected benefits 3 of the project. The liaison will also ensure that a representative of the funded organization, within a reasonable period of time, attends a regularly scheduled club meeting to present the details of the project to the membership at large. Over time, the Board may assign individual club members to act as long-term liaisons (that is, year to year to year) with specific community organizations that we have funded in the past and could possibly do so again in the future. As time goes on and new projects are identified with new community organizations, the Board may assign liaisons to these new organizations as appropriate.