

LAKEHEAD ROTARY CLUB

DONATIONS POLICY



Effective Date: July 1, 2016

This Policy is intended to establish guidelines and procedures for the effective and consistent administration of Lakehead Rotary's Donations Program for the benefit of the community. This Policy was developed by the Donations Committee and confirmed by the Board and Membership. The Policy should be reviewed annually to ensure that it meets the wishes of the members and responds to the changing needs of the community.

SOURCE OF FUNDS:

Funds used for donations are derived from fund raising programs conducted by Lakehead Rotary. The primary sources of funds are the annual Shrimp Fest [May], December Dreams [December]. These events generate \$10,000 – 12,000 with 80% assigned to donations and 20% assigned to General Account for Rotary programs supported by our Club and other Club expenses. Additional funds for community donations come from our Spirit of Thunder Bay event [scotch-tasting event in February] and 100% of the proceeds from the event will go to community donations.

FUNDING INTERESTS:

Lakehead Rotary prefers to award donations to benefit children with special needs, youth, and people with disabilities. Preference is given to those programs and services that benefit many people as opposed to a single beneficiary.

Lakehead Rotary prefers to award donations for "capital", i.e. equipment, furnishings, computer supplies, uniforms, etc. Donations may be awarded for one-time programs or new and innovative services.

ELIGIBILITY:

Lakehead Rotary awards donations to not-for-profit organizations or agencies as opposed to individuals. Organizations need not be registered charities unless the funds used by Lakehead Rotary are derived from licensed events such as lotteries [regulations require qualified donees to be registered charities].

ANNUAL & MULTI-YEAR DONATIONS:

Lakehead Rotary prefers to award donations annually as opposed to making multi-year commitments. Donations may be pledged over more than one year for exceptional purposes such as the 4-year pledge in support of the Shelter House Building Fund – the local Tri-Club Rotary Centennial project.

Lakehead Rotary has developed a special relationship with the Thunder Bay Police Youth Corps and reserves funds each year for the Corps. These funds are awarded to the Corps based on the actual requirements of the Corps in each year as proposed in an annual budget to be submitted by the Corps. This special relationship has been approved by the Board and Membership.

Lakehead Rotary has also pledged to support the Shelter Box program by way of [at least] one shelter box per year subject to available funds. This donation is usually considered by the Board in the spring prior to the June 30th Rotary year-end. The Club will also encourage individual members to support the Shelter Box program and work with area Clubs on the promotion of the Shelter Box program in the community.

GEOGRAPHIC SCOPE/LIMITATIONS:

Donations awarded by Lakehead Rotary are to be generally used to benefit the community and residents of Thunder Bay and may not be awarded for international programs/projects without the consent of the Membership.

Donations may be awarded for programs/projects that involve residents of Thunder Bay participating in events in other communities

International programs and projects may be supported by Lakehead Rotary if the Membership approves and if funds are available.

APPLICATION PROCEDURES:

Applicant organizations must apply in writing* outlining the nature of the request. The application should provide:

- brief description of the organization and its activities
- concise description of the request
- purpose and expected results
- budget of the organization
- requested amount
- supporting documentation
- name and contact information for the applicant's representative

A member of the Donations Committee may contact the applicant's representative for additional information or for clarification.

Applications are to be submitted to the Club by email or regular mail as follows:

Lakehead Rotary Club
Donations Committee
c/o 331 N. Harold Street
Thunder Bay, Ontario P7C 4C7
email: ckuschak@shaw.ca

The Donations Committee reviews the applications to confirm eligibility and submits its recommendations to the Board of Directors. The Board meets monthly and a decision on a particular application may take up to 2 months or longer for the Club to determine the proceeds from its annual fundraising events. The Board traditionally approves most of its donations in **December** and in **May** upon completion of the **December Dreams** and **Shrimpfest** events. Funds derived from the **Spirit of Thunder Bay** event will be available for donations as of **March**.

Lakehead Rotary has developed an application form for use by applicant organizations. **This form is preferred but not mandatory.**

RECOGNITION:

Lakehead Rotary requests that donees acknowledge donations in any public means normally used by the donees, including public events, print materials, and websites or social media sites operated by the donees. When it is appropriate, items of property acquired with funds from Lakehead Rotary will be marked with the Rotary emblem and/or the name Lakehead Rotary Club. Lakehead Rotary may engage the media with the assistance of the donee.