

Recommendations for Funding Process for Sunrise Rotary

Created 03-2009



1. **Review of Applications:** Establish a *Funding Proposal Review AD HOC Committee* to review all funding proposals over \$250. Group should consist of Service Committee Chair and two Service Committee members, Foundation Chair and two Foundation Committee members, one member of Board for **9** in total to vote. These meetings are open to interested club members.

The group's purpose will include:

- a. Annual review of application and process to ensure consistency and accuracy in funding according to club's wishes
 - b. Review all applications and any presentations for funding
 - c. Prioritize the requests by adhering to the guidelines that the club set
 - d. Decide on which projects would best fit with our ability to gain more funding through District Matching Grants.
 - e. Set recommendations for funding levels and present those to the Board for final vote
 - f. If we have a strong pool of applications, group may approach board to consider more dollars for allocation than originally established. The group must provide reasoning for this request along with suggestions for solutions to raise more funds if needed OR to utilize District Matching Grants were most appropriate.
2. **Application Recommendations:** Add the following points to the current application draft:
 - a. Deadlines for review (see suggested timelines in point 5.)
 - b. A notice that any request over \$2,000 will need to be accompanied by a presentation to the Funding Proposal Review Committee
 - c. Instruction sheet explaining the Guidelines and Funding Priorities established by the Club
3. **Bylaw Addition:** Adopt the current draft (with additional points above in place) of the Msla Sunrise Rotary Grant Application into **bylaws** with annual review by committee for updating.
4. **Website and Promotion:**
 - a. Place downloadable PDF application, guidelines and funding priorities on Msla Sunrise Rotary Club website. Provide ability to apply through submitted electronically to eliminate paper applications if possible.
 - b. Have PR committee announce Application Submission deadlines and information about process in community calendars and free forums and newsletters. Also have them work with webmaster to assist in clarity of process on the website.

5. **Suggested Timelines:** There are three avenues for funding through this process. Each has its own timeline and criteria. They are as follows:

a. Money Train timeline:

- i. April 1- April 30th – PR committee to make open call to submit applications *(same application used in general allocation with the exception of possibly adding one question to address how the funding agency might help with PR for the Money Train event i.e. sell tickets, get auction items, have a presence at the event, recognition plan etc.)*
- ii. May 1-15th – Montana Rail Link review for selecting top 3 applicants
- iii. May 15th -31st – Montana Rail Link hold meeting to invite top 3 applicants to present a 10 minute proposal to committee for selection of recommendation of recipient of award.
- iv. June Board Meeting – Vote to approve MRL recommendation of award recipient
- v. Announce at Club Meeting the recipient

b. General Allocation timeline:

- i. May 1st – June 30th – PR committee to make open call to submit applications
- ii. August & September – Committee review for allocation into 2 categories (Potentially Awarded and Denied) and ranked in order of priority. (1 -2 meetings)
- iii. September – Committee invite any request for \$2,000 or over that has been placed in the” potentially awarded” category to make 10 minute presentations. (1 -2 meetings)
- iv. October Board meeting – Final recommendations to Board from committee for vote
- v. Make list of allocated funds available to club in report at a club meeting

c. Small grants timeline:

- i. Create a mini-reserve of \$1,000 to be used throughout year for projects or needs that are between \$100 -\$250. Often needs arise throughout year that members bring forth. We want to be able to address these outside the application process.
- ii. We recommend that this be within the committee’s authority without requiring a board vote.
- iii. Open all year – this should be made clear on website