

Cupertino Rotary

AOS PROJECT PROPOSAL FORM (See 2nd Page for Instructions, if needed)

Funds Requested: \$ _____ (AOS) Committee

Beneficiary/Payee: _____ If 501 (c)(3) Tax ID #: _____

Contact: _____ Title _____

Tel: _____ Email _____

Address: _____

Rotarian Champion(s)/Project Manager recommending proposal: _____

Proposed Project or Program Description—location, specific need & charitable purpose being addressed:

Who are the recipients, how many are there, how will they benefit:

How will the project be carried out; e.g. length of time, number of Rotarians who will participate:

Submitted By:	Date approved by AOS:
Signature:	Dollar Amount Approved by AOS
Date submitted:	Signature Chair AOS
	Name of Project (AOS Chair to Complete)

IMPORTANT- Per CLUB Policies & Procedures, Sec. 201, Procedure 9 – Adopted by Club Board 5/30/13.

PRIOR TO SELECTION OF A PROJECT BY AN AOS, all requests for AOS Charitable Funds shall be submitted **in writing** to the appropriate AOS for their review and action.

- **The written request must include:**
 - Project Description (What charitable purpose will benefit not the payee)
 - Name of the Rotarian who will champion the project/Project Manager - The Project Manager will be responsible for the overseeing of the project and assure all funds are used for the approved charitable purpose
 - Amount of funds requested (Include funds approved from another AOS committee)
 - Charitable purpose of the project
 - Who will benefit from the project
 - How the project will be carried out
 - Length of time of the project
 - Anticipated number of Rotarians who will participate in the project

See AOS Project Form - You may use this form or create your own as long as all required information is on the form.

All Grants Must must be approved by CREF

- Projects that have been approved by the Club Board as an ongoing Club Project and have received previous Grant Approval do not need to apply for a new Grant. Examples are Rebuild, Snowflake, DeAnza Scholarship, Faces of Hope. The CREF Administrator maintains a list of ongoing approved Club Projects. Note: A **Project** is what the funds are used for, **not** the Payee.

All CREF Forms are available:

- On Clubrunner - far right side of the page toward the bottom) fillable pdf
- From Marj Mancuso) soft copy (fillable pdf) or hard copy

Completion of CREF Form 1 / Signatures needed

Note: If a Grant (Project) will require checks be written to a taxable entity such as an individual, the Grant Request shall name a Rotarian who will act as the Project Manager.

- **Form Completion**
 - Complete all sections in their entirety
 - If Payee is a non-profit, write in tax ID number
- **Signature Required**
 - AOS Chair as designated by the Club Board
 - Club CFO if AOS Chair is not available
- **Who Gets the Completed Form AND Project Proposal Form (Be sure to attach AOS approved Project Form)**
 - CREF Administrator (preferably by email)

CREF Board Meetings

- CREF meets the 3rd Wednesday of each month from 1:45 – 3 PM
- A completed CREF Form 1 – Grant Request (including all applicable signatures) as well as the AOS Project Proposal Form should be given or emailed (emailed preferred) to the CREF Administrator on or before the Friday before the CREF Board Mtg; i.e. the 2nd Friday of each month.