

Donation Committee

1. The availability of increased funds donated to the Foundation not only creates more responsibility and visibility to our donations, but also impresses more rules on us by the IRS. All Bristol Rotary members are encouraged to look for or bring forth opportunities for charitable donations. The requirements below are to establish a process to evaluate and implement bringing a proposed donation to the Board for a vote with as much information as possible, allowing the Board to make an informed judgement. The “quality” and the “community significance” of a donation are key factors in gaining greater recognition of Bristol Rotary. This in turn, will help to recruit new members, and gain credibility for more donations.
2. Donation Committee: The Treasurer of the BRCF will be the Chairman of the Donation Committee, whose other members will be chosen from the Club Board, BRCF Board or Club Membership, to help “validate” the opportunity. They will help to review and clarify answers before bringing it to the Board; in short, help the proposer to organize the proposal. Any donation request from any source is given to the Treasurer of the BRCF who informs the President. The treasurer then selects individuals from the membership that may have certain experience in the donation requester’s area of expertise.
3. Process: The Project /Donation Request Form on the website must be filled out; plus provide any other documents that could clarify the donation request. Committee members must meet the Requester and verify the information on the Form. After all necessary information is received, the information should be reviewed by the Treasurer of the BRCF to determine if funds are available and/or if any IRS or Rotary International rules have been infringed. All requests will be presented to the Club Board no matter the conclusion or opinion of the Donation Committee.
4. Financial Limits: Any donation request over \$500 should come to all Board Members 24 hours in advance of the Board meeting in which the vote will take place. If the donation request is presented at the Board meeting for the first time, the vote does not take place at that meeting, but a few days later by email. This is to give members time to review it and understand it, rather than being pressed for a vote without time to evaluate. Any donation request for \$500 or less is an exception, and a vote can take place at the Board meeting where it is first presented.
5. Voting: A Summary of the donation request and any clarifying material is sent to all Bristol Rotary Board members for an “Aye or Nay” vote – either before the Board Meeting and once again when the vote is to take place – either at the meeting or days later for an email vote. Once a quorum of the Board is received by all Board Members, the same material is sent for approval to the BRCF Board. Where timing is a factor, these materials can be sent to both Boards at the same time. Once approved by both Boards, a check is prepared along with a letter of transmittal from the President.

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6. Recognition: The President can make the determination as to who delivers the check, the venue for picture taking, and who is to appear in the photo with the Requester. The Requester must approve having his/her picture taken and they must have parental approval if there are children in the picture with them. Once the picture is taken a brief summary is written, and the Donation is posted on the Website, Facebook, the Bristol Phoenix or distributed in other ways.
7. Examples of some factors affecting the review process:
 - Make sure that Request form is filled out. And ask about any other material in writing or on a website.
 - Check on their 501(c)(3) status, if not a school, church or hospital. Go to “Yahoo.com, RI 501c3.” All 501(c)(3)’s in Rhode Island are listed there.
 - Donation cannot be made to an individual: only to a 501(c)(3), school, hospital, church (e.g., school rather than a teacher),
 - Donations cannot be to entities that redistribute the funds to other organizations (e.g. United Way)
 - Donations cannot be used to purchase tickets to non-Rotary charitable events.
 - Donations cannot be used where participation in religious activities or membership in a specific religious group is a condition for receiving benefits of the agency or program.
 - Donations cannot be used for Club administration.
8. Short Version - Donation Process Steps:
 - A Donation Request Form is filled out by: a requester, a Club member, a Board member - who submits it to the Club President or the Treasurer of the BRCF. The exceptions are the donation requests to the April Giving from charities who have been former receivers of previous donations by the Club and are well known, e.g. Women’s Resource Center
 - The President gives the Donation Request to the Treasurer of the BRCF who, based on the nature of the request, sends it to the Donation Committee or selects particular members who have a familiarity with the nature of the request.
 - The members of the Donation Committee who are involved form a plan for seeking more information from the requester and/or the charity itself and qualifies the donation – per IRS guidelines.
 - The information gleaned from the investigation is reviewed by the President and subsequently is presented to the Board with a recommendation. If the President has participated in the investigation, they can offer their recommendation, otherwise it will be made by the Chairman of the Donation Committee – the BRCF Treasurer.
 - Once approved by the Bristol Rotary Board, the BRCF Treasurer requests approval of the BRCF Board.

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- If approved by both Boards, the BRCF Treasurer writes the check and a transmittal letter for the President's signature (which also could be written by the President).
- The Club President (after consultation with the Recognition Committee) selects the site and location for giving the check to the requesting charity.
- The Recognition Committee then implements the plan for getting publicity for the donation, which may involve: Facebook, Bristol Phoenix or other media sites.