

# MARSHFIELD SUNRISE ROTARY

Funding Guidelines  
Adopted August 2006  
Revised July 2006  
Revisions Accepted August 2006

## GENERAL GUIDELINES

- Will conform to Rotary International Funding Goals
- Will fulfill Presidential Citation requirements
- Will conform to the Four-Way Test
- Will support Rotary mission statement
- Will be subject to a formal review process  
(Addendums attached)

## SPECIFIC GUIDELINES

- Funding Criteria established by the Past Presidents Committee and approved by the board will be followed by the Avenues when establishing budgets for the upcoming year and also by the Avenues and Board of Directors when evaluating requests outside of those items budgeted. Outside items that do not meet the criteria will automatically be turned down without further review. Requestor will be given an abbreviated copy of the Funding Guidelines, which will serve as a cover letter of instruction for requesting funding, along with criteria and all official report forms.
- Upon request for funding, the individual making the request will receive a letter of instruction for requesting funding and all official report forms. The requestor must complete the Grant Request form according to the requirements outlined herein and submit accordingly to the deadlines listed below for formal consideration. In order to comply with funding requirements, the project must have a signature of support from a sponsor Rotarian, who can be any member at large in the club and the Avenue chairperson, overseeing the Avenue in which this project would fall under. By signing the application forms, the Avenue chairperson is endorsing the project for consideration by the board on behalf of the Avenue membership. The Avenue chair can serve as the sponsor at large, which would require only that person's signature.
- At the beginning of each Rotary year, the Board of Directors will release the amount, which has been budgeted for granting purposes outside of the Avenues of Service pre-approved and budgeted projects. That amount is subject to change from year to year. Grant funding for reoccurring or on-going projects can be reapplied for each year. Allocation one year does not guarantee funds in following years.

- Grant requests will be accepted throughout the year; however, the Board will review and approve requests on a quarterly basis. Funds approved must be utilized within the twelve (12) months following the approval date.

Written approval or denial will be sent to the requestor by the club president within two weeks of review of the proposal. Grant cycles are as follows:

  - Submission Deadline: July 31 – August Board Review
  - Submission Deadline: October 31 – November Board Review
  - Submission Deadline: February 28 – March Board Review
  - Submission Deadline: May 31 – June Board Review
- Following submission, a member of the Board may call the requestor to schedule a face-to-face presentation of the project to the Board. The Board will either approve or deny funding after deliberation. Written approval or denial will be sent to the requestor within two weeks of the review date. If approved, letter will specify when check will be issued for the project.
- Projects that are denied can reapply for funding two additional times. If denied all three times, program will no longer be eligible to request funding for one year, unless the program changes significantly.
- Long term and/or matching grant opportunities will be budgeted as a separate line item in the club budget with automatic role over from one year to the next so that dollars can accumulate for larger prospective projects. Requests for joint projects should be submitted in the form of a letter to the Board of Directors. Approved items will be budgeted and allocated accordingly upon individual review. The initial amount will be determined and budgeted in the 2006-2007 Rotary year.
- Approved funding requests must be followed up by a presentation to the general membership by the benefactor of the funds, outlining use of dollars and the role of the designation to the success of the event/organization. If the recipient is unable to present, the Avenue Chair should provide a verbal report to the club at completion of the estimated project date as provided in the grant request application. Recipient must also submit a written Grant Report and Financial Report to the club president within 90 days of the completion of the project. If funds have not been allocated, recipient must provide information detailing what has been spent and date by which remaining funds will be spent. Final Grant Report Form must be submitted at that time.
- Funds remaining: If less than \$50 of the grant funds are unspent, Marshfield Sunrise Rotary Club is confident that the sponsors will use the balance to benefit the project or cause in some way. If more than \$50 remains, an explanation on a separate sheet should be attached to explain

why funds have not been used. The board of directors will review and determine if funds should be returned to the club. If an extension is required to complete the project, a written explanation must be provided explaining such, including a date at which time the project is estimated to be complete. Final report is due 90 days from completion date of projects.

- Failure to comply with any of the guidelines listed in this document will result in an agency/organization/project no longer being eligible for any type of assistance or funding from Marshfield Sunrise Rotary Club, until such a time the board of directors feels is appropriate to lift the ban and reconsider special circumstances.

### **FUNDING CRITERIA**

- Marshfield Sunrise Rotary typically does not fund projects of a certain nature, as listed below. However, every request is reviewed on an individual basis and given consideration based upon the criteria listed at the beginning of page one. Additional consideration will be given to those proposals that provided detailed explanation of specifics projects or activities of projects that may fit specified criteria.

If the agency/organization/project requesting funding falls into one or more of the categories listed below, they will typically be exempt from funding consideration.

Marshfield Sunrise Rotary Club will not fund the following:

1. Organizations, groups or events that have a major funding source
2. Fundraisers designed to raise dollars to grant out to another institution
3. Funding Sources (own granting organizations)
4. Individuals
5. Religious Affiliations
6. Non-direct service expenses (no administrative or overhead expenses)
7. Organizations, groups or events that cannot demonstrate a true need met