



Guiding Principles for Club's Charity Account.

1. Funds raised by Applecross Rotary during the year to be used for projects supported during the same year, except for multi-year commitments. The target balance in each account at 30 June are \$4000 in the Admin account and \$8000 in the Charity account.
2. Maintain an alignment between the distribution of any surplus from the JF and the expectations/commitments made in the Lottery West grant application.
3. The principal contribution from Applecross Rotary to other local community organizations is via their support at Applecross Rotary community events (JF and PMM). Expectation up to \$20,000/year.
4. Support New Generation projects and local school initiatives up to \$10,000/year.
5. Support established Rotary projects on an ongoing basis. Introduce new Rotary initiatives after review by the Board. Existing expectations are:
 - a. Rotary Foundation up to \$150 per annum per member. (\$6000/year)
 - b. Polio Plus \$500 per year
 - c. Australian Rotary Health \$2000 per year
 - d. Shelter Box \$1000 per year.
6. Rotary Foundation and Polio Plus donations should be funded from activities outside the contribution from general public donations, Club sponsorship and Community Grants.
7. Support for Community and International projects should be focused upon capacity building and should avoid recurrent expenditure expectations.
8. After taking into account the above-mentioned principles, remaining funds should be allocated to support local community initiatives (75%) and international projects (25%).
9. Club Projects should be planned and budgeted in advance. Aside from unexpected public emergency situations, ad-hoc donations should be minimal.
10. Applecross Rotary will establish by June 2022 a reserve of approximately \$7,500 to be used in case of unexpected funding crisis that might affect the sustainability of key Club projects. The reserve should be held in an interest-bearing deposit within the Club's Charity Account.

Adopted by Applecross Rotary Board
10 April 2019.