



ROTARY FOUNDATION OF BEAVERCREEK

P.O. BOX 340475 ★ BEAVERCREEK, OHIO 45434

Giving Guidelines and Procedures

14 March 2008

Mission Statement:

The Rotary Foundation of Beavercreek will support the community by supporting individuals and organizations that:

- demonstrate a commitment to the central Rotary value of service above self
- help young people become outstanding citizens
- improve the quality of community life
- improve education and educational opportunities
- foster international understanding and goodwill

Vision Statement:

The Rotary Foundation of Beavercreek will:

- provide effective stewardship of Foundation assets
- insure that all Foundation funds are expended in compliance with government regulations, member priorities and donor instructions
- develop and implement effective procedures for coordinating Foundation funded programs with the club
- work with the Club to increase member commitment to Foundation goals and programs

Purpose:

Provide guidelines to establish a consistent and equitable giving policy and to maintain standardized procedures to stay within the Foundation budget to the extent the Foundation Trustees deem appropriate.

Insure that all Rotary Foundation of Beavercreek, Ohio funds are expended in compliance with the mission, donor instructions, and government regulations.

Requests for Funds:

Requests for funds from the Rotary Club of Beavercreek will be in writing, normally the minutes of the monthly meeting of the Club's Board of Directors will meet this need. These requests should include the information listed below in written requests.

All requests for donations and spending must come to the Rotary Foundation of Beavercreek Trustees in a written form. The request* should be sponsored by a member of the Rotary Club of Beavercreek. All requests will be processed by the Foundation Trustees. Exemptions to this requirement are recurring Foundation sponsored events, such as the "Dictionary Project" and the "Apple Dumpling Adventure Project", that are built into the annual Foundation budget.

The written request must have at a minimum:

1. Who is to receive the donation
2. The purpose of the donation
3. Who will benefit from the donation
4. Date funds needed, if applicable
5. Sponsoring Rotarians name

* Sample request for donation or funds, attached

Send the Request to:

Rotary Foundation of Beavercreek
Attn: President
P.O. Box 340475
Beavercreek, OH 45434

By: David L. Fleming
Secretary

James L. Rudd
President



Rotary Foundation of Beavercreek

Request for Donation or Funds

All funding requests must meet the requirements of Section 501(c)(3) of the Internal Revenue Service Tax Code.

1. Name of organization/individual who will receive the funds:

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

Point of contact if different from above: _____

2. Purpose of this Donation:

3. Who will benefit from this donation?

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

4. Date funds are needed by: _____

5. Rotary Club of Beavercreek Members Sponsor:

6. Remarks and Follow-up:

