



# **Rotary Club of Beavercreek**

## **Giving Guidelines and Procedures**

### **Purpose:**

Provide guidelines to establish a consistent and equitable giving policy and to maintain standardized procedures to stay within our budgets.

Insure that all Rotary Club of Beavercreek, Ohio funds are expended in compliance with government regulations, member priorities and donor instructions.

### **Requests for Gifts:**

All requests for donations and outside spending must come to Rotary Club of Beavercreek's Board in a written form. The request should be sponsored by a member of the Beavercreek Rotary Club. All requests will be processed by the Rotary Club of Beavercreek's Board of Directors. If at the time of consideration by the board there is no sponsor, one may be assigned. Requests for funding received from other organizations (YMCA, etc) normally do not require a sponsor. Exceptions to this requirement are reoccurring Club sponsored projects that are built into the annual club 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

Sample request for Donation or Funds, Attached

A properly submitted request will be considered by the Board at its next, regularly scheduled meeting, or, if a meeting is not scheduled within the next 45 days, via the Internet.

The role of the sponsor is to ensure that the request is valid, that the funds have reached their intended recipient in a timely manor and the goals of the club's gift have been met.

Follow-up is expected on the results of the donation and should be presented by the sponsor or the recipient of the donation.

### **Funding Source:**

The Rotary Club of Beavercreek Board of Directors will make the determination on the funding source for the requests the club receives. The funding sources are the Rotary Club of Beavercreek and The Beavercreek Rotary Foundation. Funding requests forwarded to the Beavercreek Rotary Foundation by the Board are in the form of a recommendation.

## **Funding from the Beavercreek Rotary Club**

The Beavercreek Rotary Board will, at its sole discretion, evaluate each request based on the goals and objectives set by the Board, which may vary from time to time. The Rotary Club of Beavercreek adopts its budget in late June or early July, and requests made during the year must come from discretionary funds, the amount of which will vary from year to year.

### **Funding Authority:**

The Rotary Club of Beavercreek's Board of Directors will make the decision on the levels of all spending/donations for the club.

The President and President Elect are authorized to commit up to \$200 without seeking Board approval to any single source project.

The Club's Treasurer and Secretary are authorized to commit Rotary funds for the conduct of normal Rotary business.

The Rotary Club of Beavercreek's Board is authorized to commit up to \$5,000 to any single project without going to the general membership for their approval.

Multi-year cumulative commitments of over \$5,000 per Rotary Year require the approval of the general membership.

Individual members are not authorized to commit Rotary Club of Beavercreek's funds and will be personally liable for the funds if they do so.

### **Funding Requests forwarded to the Beavercreek Rotary Foundation**

The Rotary Club of Beavercreek Board of Directors will provide written requests to the Treasurer of the Rotary Foundation of Beavercreek. The Minutes of the Rotary Club of Beavercreek's Board of Directors meetings will serve as that request. In the event that timeliness is a consideration written or email urgent requests may be forwarded to the Treasurer of the Beavercreek Rotary Foundation, with informational copies to the other Rotary Club of Beavercreek Board of Directors.

### **Annual Budgets:**

An annual budget is to be prepared by the President Elect and the Treasurer. This budget is to be presented to the club prior to taking office on 1 July. This budget is to include projected income and expenditure for the Rotary Club of Beavercreek's treasury. This budget is for the "Rotary Year" in which the President Elect is to serve as President.



# Rotary Club of Beavercreek

## Request for Donation or Funds

### 1. Name of Organization/Individual who will revive 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. Beavercreek Rotary Club Members Sponsor:

\_\_\_\_\_

### 6. Remarks and Follow-up:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_