



## **Policies for Funding**

October 20, 2005

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### **Introduction**

The ultimate goal of this policy is to maximize the funds available to provide support to worthwhile and appropriate community requests or initiatives of The Belleville Rotary Club.

The Rotary Club of Belleville Charitable Grants Committee reviews all requests for community funding and recommends approval to the Belleville Rotary Club's Board of Directors.

Applications are reviewed three times a year with recommendations forwarded to the Board of Directors for a decision with a response to the applicant within a three week period.

The committee functions with a notional annual budget and will recommend funding up to one third of the expected annual budget at each review. Funds not expended will be carried over for future consideration.

The Charitable Grants Committee, where appropriate will re-consider those applications not funded at a future review. (For example: where there are insufficient funds at the time of the review).

The Rotary Club of Belleville takes responsibility to publicize this policy and to review it on a regular basis for its appropriateness to changing conditions.

### **Policy Objectives**

1. Acknowledge and respond to the needs of applicants or community initiatives.
2. Facilitate a strong, mutually supportive environment in which the community achieves a maximum level of service.
3. Convey a fundraising policy that is clear, easily understood, and fairly applied to all funded Agencies and Individuals.

4. Sets out what actions and responsibilities are expected of a Funded Agency/Individual and what actions and responsibilities are expected of The Belleville Rotary Club.
5. The Belleville Rotary Club and the Funded Agencies are partners working together to provide needed social services to the community. The Belleville Rotary Club facilitates cooperation between Agencies/individuals, where appropriate, and to minimize duplication of effort and redundant expense where possible.
6. The Local Community Charitable Grants Committee was established to provide support to activities that fall within the objectives of Rotary, especially those that involve the well being of children facing barriers, with projects in which members of the club are involved, those which emphasize a healthy environment and support the objectives of Rotary International.

### **Duties of the Charitable Grants Committee**

The Charitable Grants Committee of the Belleville Rotary Club shall:

- Review the application and supporting information of all applicants to determine the organizational plan, method of delivering service and the sources of financial support, apart from the Belleville Rotary Club, in order to avoid unnecessary duplication of costs and services.
- Assess and make recommendations to the Board of Directors of the Belleville Rotary Club at least three times per year.
- Maintain records of all funding requests and submit reports to the Board of Directors following each review period.
- Upon approval by the Board of Directors of each application, notify the agency/individual of the approval or non-approval of the requests.
- Maintain a responsible representation of Club members on the Charitable Grants Committee to ensure broad community representation.
- Approve applications within an annual budget to be administered by the Treasurer of the Club.

### **Duties of a Belleville Rotary Club Funded Agency/Individual**

A Belleville Rotary Club Funded Agency or Individual shall:

- Provide the information requested in the application package.
- Provide a breakdown of the budget for the project, other sources of funding and any other reasonable financial information that the Belleville Rotary Club Charitable Grants Committee or Board of Directors may request.

- Maintain responsible management with a knowledgeable and involved Board of Directors that meets at least four (4) times per year.
- Cooperate with other private and public agencies to promote effective and efficient services, and to prevent duplication of effort as far as possible
- Consult with The Belleville Rotary Club prior to changing any existing program/service presently containing funding by Rotary Clubs.
- Encourage the Agency Board of Directors or individuals to speak to the Club, offer agency tours, etc.
- Display its affiliation with the Belleville Rotary Club prominently in one or more of the following ways: in its offices, centre of operation, on stationary, mobile equipment, news releases, advertising materials, logos and certificates.

*The Agency Board of Directors or individuals funded by the Belleville Rotary Club is responsible for attaining a working knowledge of this policy and assuring the Agency's/individual's compliance.*

### **Approval**

Approval of proposed application will be based on the following factors, as measures to determine whether the activity supports the objectives of The Rotary Club of Belleville.

- The application provides a service to local handicapped children.
- The application provides a service to building a healthy environment.
- The application supports the aims and objectives of Rotary
- Rotary Club members are involved in the project.

### **Compliance with Policy**

The Charitable Grants Committee will be responsible for investigating any Agency or Individual it feels is not abiding by this policy. The Charitable Grants Committee will make recommendations to the Board if it feels there has been a breach of policy including, but not limited to:

1. Pointing out the Agency's conflict with the policy and the possible results.
2. Recommending appropriate action, which could include a proportional reduction in the Agency's allocation or review to determine if the Agency should continue to be funded by The Belleville Rotary Club.