



July 21, 2015

## **Upper Keys Rotary Club Donation Policy and Procedures**

### **Purpose:**

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

Insure that all Upper Keys Rotary Club funds are expended in compliance with government regulations and member priorities.

### **Requests for Donations:**

All requests for donations and outside spending must come to Upper Keys Rotary Club in a written or electronic form. A member of the Upper Keys Rotary Club should sponsor each request. The Upper Keys Rotary Board of Directors shall consider all requests. If at the time of consideration by the board there is no sponsor, one may be assigned by the President or his designee. Requests for funding from other non-profit organizations in good standing shall not require a sponsor.

### **The written request must use the attached form.**

The Board at its next, regularly scheduled meeting will consider a properly submitted request. The President may convene a special Board meeting to consider a request he/she deems to be urgent.

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 within 90 days of completion.

### **Funding Sources:**

The Upper Keys Rotary Board of Directors will make the final determination on the funding source for all donation requests.

### **Funding from the Upper Keys Rotary Club:**

The Upper Keys Rotary Club 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 Upper Keys Rotary Club shall adopt a maximum dollar budget in late July or early August. The allocated funds must be committed each year by the annual election of the new Board and Officers. No "rollover" of funds is allowed, but the budgeted amount can vary from year to year.

### **Funding Authority:**

A simple majority approval by the sitting Board of Directors of the Upper Keys Rotary is required for any funding.

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No individual Rotarian has the authority to bind the Upper Keys Rotary club to any donation. Any Rotary who so commits the Upper Keys Rotary will be personally liable for the funds.

Multi-year, cumulative commitments are not allowed. Each donation request must be made by the submission of the appropriate application. A decision to fund a request must be made irrespective of prior year funding.

Nothing in this policy is intended to limit the ability of any Rotarian from contributing personally to any charitable purpose.

Requests may be submitted by US Mail or E-mail to the following:

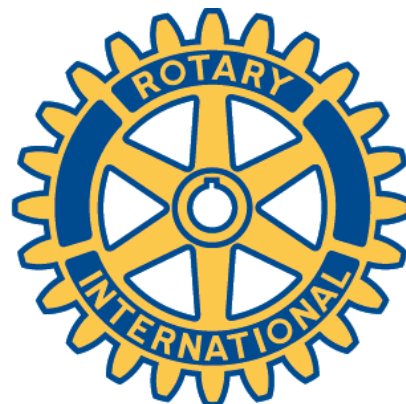
**US Mail:      Upper Keys Rotary Club  
Request for Donation or Funds**

Attn: Board of Directors  
P.O. Box 1514  
Tavernier FL 33070

**E-mail:        UKRotaryBoard@gmail.com**

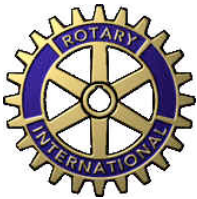
**Please allow up to 4 weeks for a response to your request.**

**Thank you!**



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**SERVICE Above Self**



**Upper Keys Rotary Club  
Request for Donation or Funds**

Attn: Board of Directors  
P.O. Box 1514  
Tavernier, FL 33070

1. Official name of the Organization: \_\_\_\_\_

2. Contact Person:

Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Email: \_\_\_\_\_

Organization Website: \_\_\_\_\_

3. \*Employer Identification Number: \_\_\_\_\_

4. Please list below your local Board of Directors: (or attach current list)

\_\_\_\_\_  
(Chairperson)

\_\_\_\_\_  
(Director)

\_\_\_\_\_  
(Secretary)

\_\_\_\_\_  
(Director)

\_\_\_\_\_  
(Treasurer)

\_\_\_\_\_  
(Director)

\_\_\_\_\_  
(Director)

\_\_\_\_\_  
(Director)

\*The EIN, or Employer Identification Number, is also known as a federal Tax Identification Number (TIN), and is used to identify a nonprofit entity. An EIN is a unique 9-digit number, similar to a Social Security Number for an individual.

5. Please list your organization's funding sources: (approximate percentage, but the total must equal 100%)

Federal Government	____%, or	Public Donations	____%, or
	\$ _____		\$ _____
Provincial Government	____%, or	Foundations	____%, or
	\$ _____		\$ _____
Municipal Government	____%, or	Corporations	____%, or
	\$ _____		\$ _____
Parent Organization	____%	Bequests	____%, or
	\$ _____		\$ _____
Employee	____%, or	Service Clubs	____%, or
	\$ _____		\$ _____
United Way	____%, or	Special Events	____%, or
	\$ _____		\$ _____

Percentage of your total budget spent on the administration: \_\_\_\_%

Number of Paid Staff? \_\_\_\_\_ Number of Volunteers? \_\_\_\_\_

6. List other local Service Clubs you intend to approach or have approached and indicate support received, if any (*Important – Include other Rotary Clubs*)

_____	_____
_____	_____

7. Beneficiaries of the requested support:

\_\_\_ Youth    \_\_\_ People with disabilities    \_\_\_ Seniors    \_\_\_ Other (Please specify below)

\_\_\_\_\_

\_\_\_\_\_

8. The funds will be used for:

\_\_\_\_\_ Capital Expenditure                      Please specify: \_\_\_\_\_

\_\_\_\_\_ Other    Please specify: \_\_\_\_\_

9. Project Budget:

Total cost of the project:                                      \$ \_\_\_\_\_

Amount requested of Upper Keys Rotary                      \$ \_\_\_\_\_

10. When are funds required? \_\_\_\_\_

11. Additional Remarks Regarding this Donation Request:

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

\_\_\_\_\_  
Printed Name of Applicant

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

Contact Information:

Phone #: \_\_\_\_\_

E-mail: \_\_\_\_\_

IMPORTANT: Applications may not be considered without a completed Request for Funding.

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Please Note: A completed application is not an agreement to honor your request. A previous donation does not guarantee a donation will be offered again for a specific event or donation amount. Although we would like to support every worthwhile cause, we must focus our efforts on those that provide the most benefit to the community we serve. We appreciate the time and efforts of your organization and wish you success with your event.



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**SERVICE Above Self**