

Hickory Rotary Club
Charitable Giving Committee
Donation Request Procedures

Objective:

The objective of The Charitable Giving Committee is to encourage and foster the ideals of service above self as a basis of worthy enterprise with an emphasis on education. To promote this objective, the Hickory Rotary Club will make donations and contributions to worthwhile causes, individuals and organizations. As our club is being approached as a source of charitable donations to the many non-profit and other organizations in our community, the importance of maintaining a streamlined process for dealing with these requests is evident.

General Guidelines:

The Hickory Rotary Club is a service Club committed to serving others. Many of our fundraising dollars are dedicated to specific programs as determined by the Board of Directors annually and consistent with our Bylaws. These include scholarship programs, Rotary Foundation, international projects, and other specific programs. Funds not otherwise committed will be available for donation request, according to the following guidelines and within the limits of the Club's budget and finances. At the beginning of the Rotary fiscal year (July), as a part of the budgeting process the Board of Directors will make an estimate of the amount of funds that will be available during the coming year for donations and contributions to worthy individuals and organizations. A donation request form must be completed in order to be considered for a charitable gift.

Qualifications:

Any organization or individual may request a monetary contribution. The following will be considered when evaluating the merits and amount of any contribution:

Contributions may be requested:

- For local educational programs
- To support local individuals and local community projects only
- To assist in hardship and disaster cases (i.e., hurricane/tsunami relief, etc.)

Contributions will **not** be made to the following:

- Governments
- Individuals without demonstrated need
- Projects without long term benefit
- Projects that provide only publicity to the Club
- Political organizations
- Organizations or individuals without a defined objective, purpose and/or goal.

Request Evaluation:

Recommendations for funding will be evaluated based on the following criteria:

- Type of individual or organization
- Need, project merits
- Degree of match with Rotary mission and vision
- Long term benefits
- Number of persons benefited
- Other possible support
- One time contributions vs. on-going support
- Past contributions to individuals or organizations
- Possibility of Rotary participation
- Reputation and stability of the requesting individual or organization

Procedures:

- 1.) Individuals or organizations wishing monetary contributions from the Club must submit all requests in writing, completing the "Request for Funding Application" and a cover letter to the Charitable Giving Committee.
- 2.) The Charitable Giving Committee will review the applications as they are submitted throughout the year. The Charitable Giving Committee will review the applications and make a recommendation to the Club Board of Directors. The recommendation will include whether or not to make a contribution and the amount recommended.
- 3.) The Board of Directors will consider the recommendations at their next regularly scheduled meeting. Based on the recommendation of the Charitable Giving Committee, the annual budget and the current financial condition of the Club, the Board of Directors will make the decision as to whether to support the request for funding and the amount. The decision of the Board of Directors will be final.
- 4.) Once the Board makes the award or denial, the chair of the Charitable Giving Committee will notify the individual or organization. If the request is approved, the Rotary will request provide a check in the amount granted by the Board of Directors to be used for the purposes stated in the application.
- 5.) If a donation is awarded, it is anticipated that a representative from the organization will attend a future Club meeting to formally accept the donation, schedules permitting.

The Charitable Giving Committee will comply with the above procedures, time frame and schedules. However, in the event that an applicant is unable to complete the application within the time schedule, or far enough in advance of date the funds are needed; efforts will be made to expedite the application through the process.

Hickory Rotary Club Charitable Priorities

The Hickory Rotary Club has established three types of organizations and individuals as priorities for assistance:

- **Educational** programs and facilities which contribute to the learning, health and well-being of students within Hickory who are present and future contributing members of society
- **Children**, whose growth, learning and healthy development can be aided and whose special needs can be met through programs providing positive experience, mentoring and/or financial assistance
- **Community life and cultural enhancement** programs and facilities, which contribute to the positive enhancement of our communities.

Additional characteristics of organizations and projects are considered in assessing an applicant's eligibility and the amount of assistance to be provided:

1. Programs sponsored, endorsed or otherwise affiliated with an active Rotarian will receive additional consideration
2. Programs aligned with the mission and vision of Hickory Rotary Club and Rotary International (*The mission of Rotary International, a worldwide association of Rotary clubs, is to provide service to others, to promote high ethical standards, and to advance world understanding, goodwill, and peace through its fellowship of business, professional, and community leaders.*)
3. Funding is not provided to political organizations.
4. Funding or equipment is not provided to other groups for the purpose of their fundraising projects.
5. Project or equipment funding may be preferred over ongoing support for operating expenses.
6. Funding on a continuous basis is generally not provided. However, exceptions are made for programs of special, ongoing interest to Rotarians and for ongoing needs seen as urgent.

Applications shall be considered as they are received. Decisions on applications for funding will be returned to the applicant in writing.

Please submit applications to:

**Hickory Rotary Club
P.O. Box 2628
Hickory, NC
Attention: Charitable Giving Committee**

If questions please contact: Leslie Ferrell via e-mail LFerrell@catawbacountync.gov or 828-695-6506.

Hickory Rotary Club
P.O. Box 2628
Hickory, NC
Attention: Charitable Giving Committee

Request for Funding Application

The Hickory Rotary Club is dedicated to helping meet the needs of its local community in line with the principles of Rotary and the Hickory Rotary Club's bylaws. All donation requests will be reviewed **annually**. All approved requests will be paid by **check only**. Please fill out this form **completely** and return to the address listed above. Type or print legibly with blue or black ink. Please be advised that requests for political contributions or donations to political causes will not be considered. *If awarded, any donation should be considered a one-time gift and should not be anticipated on a continuous basis.

Date of request: _____ Amount requested: _____

Name of Organization: _____

Phone: _____

Address: _____ City/Zip: _____

Name of person requesting donation: _____

Position with Organization: _____

E-mail Address: _____

Are you authorized to request funds on behalf of the organization? _____ Yes _____ No

Is the Organization a tax exempt 501(c)3 non-profit? _____ Yes _____ No

Describe how donation is to be used. **Please be specific!** (Attach additional sheets if necessary):

Briefly describe the Organization's primary purpose/mission (Attach brochures, pamphlets, if available):

Name(s) of Rotarian(s) from Hickory Rotary Club affiliated with this Organization (if any):

Has the Hickory Rotary Club given to your Organization in the previous 12 months? _____ Yes _____ No

If this request is granted, please state how your organization will recognize participation/support by the Hickory Rotary Club in the activity/project funded.

Hickory Rotary Club is a service organization that aims to be directly involved with the activities/projects we support through our charitable giving. If this request is granted, please list any and all volunteer opportunities that may be available to our club members for your proposed activity/project.

By signing below, I (We) affirm that the information being provided is true and correct to the best of my (our) knowledge. I (We) also consent, should a donation be awarded, to the use of the Organization's name and other information, logo, photos of the Organization and its agents, etc. in any promotional material generated by the Hickory Rotary Club for their use. I (We) also consent to creating a Public Service Announcement about the donation for local news outlets if so requested by the Club. If a donation is awarded, I (We) agree to have a representative from the Organization attend a Rotary Club meeting to formally received the donation, if schedules permit. I (We) agree that this form and any additional information provided to the Hickory Rotary Club about the Organization will be kept and not returned regardless of whether or not the request for donation is approved or declined.

Signature/Title of Requestor: _____

Make check payable to: _____

Name/Address to be mailed to: _____

FOR ROTARY USE ONLY

Date request received: _____ Received by: _____

Charitable Allocations Committee Recommendation:

____ Approve ____ Decline Amount Recommended: _____ Date: _____

Board of Directors:

____ Approve ____ Decline Amount Awarded: _____ Date: _____

____ Mailed ____ Picked Up By: