

ALAMO HEIGHTS ROTARY
Guidelines and Policies
Requests for Charitable Organization/Agency Funding
July 2010 Revision

1. Each year funds are raised through a variety of means by the Alamo Heights Rotary Club (AHRC) and Alamo Heights Night LLC (AHNLLC) and are made available for charitable giving to 501c(3) organizations and other agencies.
2. All disbursements will be made in accordance with established policies and procedures of the AHRC and AHNLLC.
3. Organizations and activities desiring funding must submit a written application for the funds by completing a General Information Form (attached). The form must be completed by an authorized representative of the organization/agency. Failure to fully complete the form may result in delay or denial of the request. The form must be signed also by an Alamo Heights Rotary Club Rotarian as the sponsor **or it will not be considered**. *The only material to be submitted is to be the general information form and latest organization financial statement. If there is not sufficient space on the general information form to provide the requested information, the organization/agency may add **no more than two pages (one page with two sides of information or two pages with one side each page) of additional material in support of their request.** Brochures, annual reports, and other material should not be submitted.*
4. All requests will be reviewed by the AHRC Finance Committee based on the written materials provided. Unless specifically requested by the Finance Committee, no presentation will be made in person by representative(s) of the requesting organization/agency on behalf of the request. The Finance Committee is charged with reviewing charitable funding requests and making recommendations to the AHRC Board of Directors for approval.
5. All materials submitted by any organization/agency shall become the property of the AHRC and may be made available to the Club Board of Directors and the AHNLLC Board of Managers.
6. Requests for funds may be submitted at any time. *However, the AHRC Finance Committee Chairperson will establish a cutoff date for receipt of requests to be considered at the next scheduled meeting (normally one month prior to the meeting). Requests received after that date will be held and considered during the next scheduled meeting if there is one that fiscal year.* Meetings are normally held once each quarter as long as funds are still available. The AHRC Fiscal Year is July 1-June 30. The first Finance Committee meeting is normally conducted in September each year (schedules may vary). *Meetings and cutoff dates are posted on the Calendar Section and Charitable Funding page of the AHRC web site (www.ahrotary.org) when scheduled.*
7. All allocations are one-time disbursements and no future commitment is automatic or implied.
8. The Finance Committee will inform requestors within 120 days *of the next scheduled meeting* of the status of the request.

ALAMO HEIGHTS ROTARY CLUB
Request for Organization/Agency Funding
General Information Form

Please type or print legibly (difficult to read or unreadable forms will not be considered)

Today's Date _____

Name of Organization:

Address, City, State, ZIP: _____

Telephone: Daytime () _____ FAX: () _____

Email address:

Name and Title of representative completing this form: _____

Alamo Heights Rotary Club member endorsing this request: _____

SIGNATURE of endorsing Rotarian:

(If more space is required for responses, no more than a total of two pages of added material may be added.)

Describe the Purpose/function of your organization/agency and who or what does the organization/agency support:

Are you a 501(c)(3) organization as determined by the IRS? YES _____ NO _____
If NO, describe your non-profit organization status:

How long has your organization/agency been in existence in Bexar County? _____

What is your current operating budget? \$ _____
(Attach a copy of your latest financial statement)

What are your major sources of funding?

Do you receive funding from the United Way of San Antonio? YES _____ NO _____

If yes, how much was your last allocation and for what year? Amount \$ _____ YR _____

Have you previously requested funds from the Alamo Heights Rotary Club?
YES _____ NO _____ If YES, how much was your last request? \$ _____
What was disposition of the request?

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What amount of funds are you requesting at this time?

What is the **specific purpose** for which you are requesting funds?

Is there a way in which the Alamo Heights Rotary Club can take an active role in assisting your organization/agency whether or not this funding request is approved?

YES _____ NO _____

If yes, please describe:

SUBMIT ALL MATERIALS INCLUDING SPONSOR SIGNATURE TO:

Alamo Heights Rotary Club
Finance Committee
PO Box 6995
San Antonio, TX 78209

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FOR OFFICE USE ONLY

Date received:

Date reviewed by Finance Committee:

Finance Committee recommendation:

Date reviewed by Board of Directors:

Board of Directors decision:

Review by AHNLLC:

Requestor notified:

Date check sent/delivered:

Date filed with Executive Secretary: