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**CHARITABLE FUNDS ADVISORY GROUP POLICY**

Background

Since its inception, one of the goals of the Winchcombe Rotary Club is to raise money for charitable purposes. The Club has given grants to several national and international organisations and charities, as detailed on the website and in the report of the Charitable Incorporated Organisation.

**Strategy**

1. The Charitable Funds Advisory Group:

Membership: The Group will consist of at least three members of the Club who will be elected by the members. Members will normally be appointed for 3 years but may be re-appointed. Officers of the Club will not be eligible to serve as members.

Responsibilities: Applications for funding must be made using the form, available on the Club’s web site and from the Secretary. The Advisory Group will review all funding applications and make recommendations to the Club members. All decisions on funding will be made at the Club meetings and not by the Advisory Group.

2. The guiding principles for charitable donations:

priority will be given to humanitarian purposes; the Club does not support animal charities.

priority will be given to charitable and public organisations; money will be given to individuals on an exceptional basis only.

priority will be given to those projects where the contribution will be considered to make a significant and enduring difference.

priority will be given to local needs, to national/international needs where there is a local connection, and to Rotary sponsored charities.

3. Allocation of funding

Legacy Fund: The Legacy Fund is designed to provide funding for a significant project that will be of long-term benefit to the people of Winchcombe and its neighbourhood. The Club has agreed that 50% of all charitable donations will be put towards the Legacy fund until the cap of £20,000 is reached. Applications for the Legacy Fund will be made through the same process as the general applications.

Once an allocation for a grant is agreed, that sum will be ‘ring-fenced’ until the grant is made. Thus, long-term commitments will be protected.

Occasionally the club will arrange to hold fundraisers for a specific nominated charity or charities, in these cases the CFAG does not need to be involved.

Any member of the Club may nominate a charity or appeal for support using the application process. Additionally, some internal applications may be put forward which do not require completion of the form e.g., support of District initiatives. In these cases, an email to the President and the CFAC Lead should be sent to include; who is the beneficiary, value of the award, rationale for the award and how the request originated. All nominations, external or internal, will be discussed by the Advisory Group, and a recommendation will be made at the Club’s Business meeting. This recommendation will be passed on to the Trustees of the Winchcombe Rotary CIO for action.

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