

# Tri-District Proposal & Pledge Tracking System

## Rotary 5520/4110/5470 Tri-District Conference 2005

### ***The Issue***

The Rotary Tri-District Conference represents a tremendous opportunity to bring proposing clubs and pledging clubs together to create projects that represent the spirit of Rotary in our three districts. The Tri-District serves as a “clearinghouse” for proposals and pledges.

Accomplishing this in basically a day is a daunting task. There are so many proposed projects that it has been difficult for potential pledging clubs to keep the proposed projects straight. The proposing club presentations are helpful, but unless all clubs keep copious notes it has been difficult for pledging clubs to track the proposals that appeal to them.

Further, there has been no way to track the status of proposals and pledges either at the conference or afterwards. Pledging club funds were often tied up in proposals that never progress beyond the conference.

The project and pledge tracking system described in this document is designed to streamline the proposing and pledging process at the Tri-District conference and afterwards.

### ***New Tools***

The new tools include:

1. Project Proposal form. A one-page summary of the project to be distributed by proposing clubs as a tool for “selling” their proposals.
2. Project Signup form. A one-page form to be used by pledging clubs for making commitments to proposals.
3. Form for documenting district commitment of DDF money.
4. A database or spreadsheet to track each proposal and pledge.
5. A consolidated Tri-District web page after the conference will display the status of each proposal.

### ***How the System Will Work***

1. Clubs proposing projects will complete the 1-page Project Proposal form, which will be available as a “writable” Acrobat document. Writable Acrobat documents can be printed and filled out by hand, or pulled up on a computer screen for typing and printing. (The document cannot be saved or emailed with the information typed into it unless the user has the full version of Acrobat—not just the Acrobat Reader.)
2. Clubs can be emailed the Acrobat project proposal form or can access the form on the web.

3. We should encourage clubs to fax or mail the completed project proposal form to their district's international/foundation chair. (Dick Foster for 5470, Pat Sonnier for 5520, and Oscar Narvaez for 4110) A deadline of October 8, 2004, has been chosen to allow enough time for the mails if a club chooses to mail its form.
4. District contacts will then fax the proposal forms to Loren Kuehne of District 5520 (505-522-3332). Loren will:
  - a. Assign a proposal number to the form
  - b. Scan the form into an Acrobat document with the proposal number as the document file name.
  - c. Make twenty-one copies of the proposal with assigned number
  - d. 3-hole punch and keep one copy in a master notebook
  - e. Log the project proposal into a laptop spreadsheet
5. Projects will be assigned a consecutive proposal number (001 through 030) as they come in. Five projects will be allowed from each of Districts 5520 and 5470. Twenty projects will be allowed from District 4110.
6. Although we must encourage clubs to submit their proposal forms by the deadline, clubs may print the form and fill it out by hand and bring it to the Tri-District Conference, or fill it out at the conference, if there are numbers available in the club's district allocation.
7. Proposing clubs will be given the twenty photocopies of their numbered proposal form for use in soliciting pledges at the conference.
8. Proposing clubs will also make a formal presentation, after which they will also pass out copies of their forms.
9. Pledging clubs decide which proposals they will support and complete a Project Signup form. They take the form to the project registration table, where a copy of their pledge form is made, 3-hole punched, and placed in the master notebook with the proposal it supports. The pledging club number and amount pledged are logged into the laptop so a running total of each proposal's need and total pledge status is constantly available.
10. The conference MCs (Past RI President 2000-01 Frank Devlyn and PDG Bob DeLaHunt) will use the status reports to help proposals that are near reaching necessary pledges to achieve the needed funds.
11. District Grant and/or Foundation Committees will document each district's DDF commitment on the "Commitment for Matching Grant" form.
12. After the conference, the collected data will be electronically posted to a web site so proposing or pledging clubs (or district staff) can track proposal status until assigned a matching grant number or time for paperwork completion runs out.

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