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## **ROTARY INTERNATIONAL, DISTRICTS 4110/5470/5520**

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### **TRI-DISTRICT CONFERENCE 2007**

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### **TRI-DISTRICT PROPOSAL & PLEDGE TRACKING SYSTEM**

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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 event serves as a “clearinghouse” for proposals and pledges.

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

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#### **☉ FORMS FOR PROJECT FAIR USE:**

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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. DDF Form for documenting district commitment of DDF money.

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#### **☉ ELECTRONIC FORMATS FOR USE BY GRANTS TEAMS AND PARTICIPANTS:**

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4. A database or spreadsheet to track each proposal and pledge.
5. A consolidated Tri-District Conference web page will display the status of each proposal.

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### **HOW THE SYSTEM WILL WORK**

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#### **☉ WEB REGISTRATION OF PROJECTS:**

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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 at <http://rotarytridistrict.org>
3. We encourage clubs to fax or email the completed project proposal form to their district’s international/foundation chair. DGSC Mike Lanham for 5470, DGSC Robert Boverly for 5520, and DGSC Patricia Legarda for 4110.

- 4. The deadline for receipt by mail is October 08, 2007.**
- 5. The deadline for receipt by e-mail is October 22, 2007.**
6. District contacts will then fax or e-mail the proposal forms to the Host District DGSC. The Host DGSC 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. 3-hole punch and keep one copy in a master notebook
  - d. Log the project proposal (using Excel) into a laptop spreadsheet
  - e. E-mail to each DGSC the completed and numbered project proposal form.
  - f. The Host DGSC will post the completed and numbered project to the website.
  - g. The Host DGSC will notify registering clubs of the posting of their project to the website.
7. Although we 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.
8. Pre-registered Proposing clubs will bring twenty photocopies of their numbered proposal form for use in soliciting pledges at the conference.
9. District Grant and/or Foundation Committees will document each district's DDF commitment on the "Commitment for Matching Grant" form.
10. Prior to the end of the project fair, all DGSC's will meet to confirm DDF commitments, projects funded and exchange information on incomplete project proposals.
11. After the conference, the collected data will be posted to <http://rotarytridistrict.org> for tracking proposal status until assigned a matching grant number or time allowed for paperwork completion runs out.

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