

Tri-District Proposal & Pledge Tracking System

Rotary 5520/4110/5470 Tri-District Conference 2008

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.

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 (White). A one-page summary of the project to be distributed by proposing clubs as a tool for “selling” their proposals.
2. Project Signup form (Yellow). A one-page form to be used by pledging clubs for making commitments to proposals.
3. DDF Commitment Form (Light Blue). A one-page form for documenting district commitment of DDF money. It is to be signed by the District Foundation and Grants chairs.
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. A methodology needs to be developed to follow-up on RI Foundation approved projects.

How the System Will Work

1. Clubs proposing projects will complete the 1-page Project Proposal form (White), 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 email, fax or mail the completed project proposal form (White) to their district's foundation and grants chairs. The foundation chairs are (Joe Williams for 5470 j-williams@hydropuretechnology.biz , Rick Akins for 5520 rakins@donchalmersford.com , and Pepe Avila for 4110 svavila@aol.com) A deadline of August 29, 2008, has been chosen to allow enough time for the mails if a club chooses to mail its form. This will give the district foundation chairs an idea on the amount of DDF needed to support the proposed projects.
4. District contacts will then email or fax the proposal forms to Loren Kuehne of District 5520 (districtadmin@rotary5520.org or 575-522-3332). Loren will:
 - a. Assign a proposal number to the form (White)
 - b. Scan the form into an Acrobat document with the proposal number as the document file name.
 - c. Make two copies of the proposal with assigned number. Additional copies can be at the photocopiers provided at the conference.
 - d. 3-hole punch and keep one copy in a master notebook of all Project Proposal forms (White).
 - e. 3-hole punch create a master notebook DDF Commitment Forms for each registered project (Light Blue).
 - f. Log the project proposal into a laptop spreadsheet
5. Projects will be assigned a consecutive proposal number (District Number - 001 through District Number - XXX) as they come in.
6. Although we must encourage clubs to submit their proposal forms (White) 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.
7. Proposing clubs will be given their numbered proposal form (White) by Loren for use in soliciting pledges at the conference. They will be able to make as many copies as they need at the photocopiers provided at the conference.
8. Pledging clubs decide which proposals they will support and complete a Project Signup form (Yellow). They take a copy of the form (Yellow) to the project registration table. It will be 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.
9. The conference MCs (???) will use the status reports to help proposals that are near reaching necessary pledges to achieve the needed funds.
10. District Grant and Foundation chairs will document each district's DDF commitment on the "Commitment for Matching Grant" form (Light Blue). Once all the signatures are obtained a copy must be given to Loren at the registration table.
11. After the conference, the collected data will be electronically posted to a District 5520 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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