



Boulder City Sunrise Rotary Club

Policies and Procedures Manual

Adopted by the Board of Directors January 8, 2014

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These policies and procedures have been adopted by the Board of Directors of the Boulder City Sunrise Rotary Club to facilitate Club administration and are meant to clarify and supplement the requirements of the Boulder City Sunrise Rotary Club Bylaws and Constitution.

Changing Policies

Additions or revisions to policy may be introduced to the board of directors for review and comment at a regular board meeting. The amended policy will be offered for approval at the following month's board meeting, requiring a two-thirds majority for approval.



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1. President Time Line

Purpose

The purpose of this procedure is to give the incoming president an initial point of reference to determine some of the basic presidential requirements, and the approximate point in the year in which the requirements should be completed. This information does not supersede the BCSR Constitution, or the BCSR bylaws. This information is not intended as a replacement for the up-to-date information that the incoming president will acquire by attending the mandatory President's Readiness Education Program (PREP) and President Elect Training Seminar (PETS).

Timeline

November

1. Copy of this form to President Elect
2. Start selecting members to help with weekly meetings:
 - a. Secretary
 - b. Treasurer
 - c. Sgt. at Arms
 - d. Set up and take down crew
 - e. Weekly newsletter & Speakers
 - f. Board of Directors
 - g. Committee Chairs (Check with current president)
 - h. Pictures and Publicity

December

1. Attend Presidents Readiness Education Program (PREP) formerly Pre-Pets. (NV or Cal)
2. Review DaCdb member info for Semi-Annual Report submittal in January. (identify incoming officers and board of directors)

January

1. Set up E-mail lists to communicate with members (DaCdb)
2. Review and approve SAR and District dues submittal

February

1. Attend PETS in California (President elect training)
2. BODTS training optional (Board of Directors training in LV)

March

1. Attend District Assembly (Barstow). Be prepared to pledge for District Governor's project

April

1. Get forms ready to turn in to District (You will be notified by the district)
 - a. Club goals form (Check with current president)
 - b. Operating budget Form (Check with current president)
 - c. Planning Guide Form/Rotary.org/my rotary (Check with current president)



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May

1. Attend District Conference

Incoming President Timeline

June

1. Co-ordinate first take over meeting with current president
2. Order Pin and wall plaque for Past president
3. Introduce team for the coming year
4. Review DaCdb member info for Semi-Annual Report submittal in July.
5. Request Board approval of incoming board of Directors and key committee chairs.

July

1. First weekly meeting
2. Review and approve SAR and District dues submittal

Important events throughout the year

- a. Governor's Visit
- b. Wurstfest
- c. President's Advance
- d. District Assembly
- e. District Conf.
- f. Monthly Board meetings.

Last weekly meeting of Presidency

Co-ordinate with incoming president's awards and thank you at last meeting:

1. All weekly set up people.
2. Newsletter
3. Secretary
4. Treasurer
5. Sgt at Arms
6. Foundation Board Chair
7. Youth Activities Chair

Special Awards at last weekly meeting

1. Loud & Proud Goldie Award
2. Alice Isenberg Award (Check with last year's recipient for traveling award)
3. Rotarian of the year award
4. Award to Past President (Gavel Award)
5. Perfect Attendance Awards



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2. Policies and Procedures

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Membership

Membership

The Boulder City Sunrise Rotary Club accepts new members by invitation only. All new members must be proposed for membership by a club member or the Membership Committee. Once proposed, the membership committee will submit the prospective member to the board of directors for approval. After Board approval, the membership committee will submit the prospective member to the general membership for comment.

Note: Proposed members are not “approved” by all club members. Even if one or more members object to a new member, the Board may still approve admission of the new member into the club. See the New Member Process which follows, outlining the process for approval of a new member.

Process:

- Prospective members will be proposed by a Rotarian in good standing or membership committee by providing the membership committee with a Proposed Member form.
- Once received, the membership committee will email the board of directors for approval and individual directors will respond back yea or nay.
- If approved by the board of directors, the membership committee will then email the general membership for comment.

Red Badge Program

A new member is issued a temporary “Red Badge” when he/she joins the club and is provided a mentor to assist the new member with integration into the club. The new member must earn their permanent “Blue Badge” by executing the mentor-described portions of the Red Badge Checklist found in our Boulder City Sunrise Rotary Fireside Chat manual:

Highly recommended activities:

- ATTEND FIRESIDE CHAT/NEW MEMBER ORIENTATION (see Club documents)
- PARTICIPATE IN A CLUB SERVICE PROJECT OR SERVICE EVENT
- ATTEND A MEETING AT ANOTHER ROTARY CLUB
- ARRANGE FOR A GUEST SPEAKER FOR A REGULAR MEETING
- ATTEND A SUNRISE ROTARY BOARD MEETING HELD ON THE FIRST WEDNESDAY OF THE MONTH
- GIVE THE MORNING BLESSING OR LEAD THE PLEDGE OF ALLECIANCE.

ELECTIVES: (Choose three from list)

- Serve as greeter four (4) times.
- Invite a guest to Sunrise Rotary.
- Introduce a prospective member to Sunrise Rotary.
- Try to sit at a different table for breakfast each week.
- Assist the Sergeant of Arms by selling raffle tickets at one of our meetings.
- Lead the club in reciting the 4 Way Test.



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Dues

The Boulder City Sunrise Rotary Club is a membership organization and there are member dues necessary to cover the cost of meals, the clubs operation and district and Rotary International dues. In addition, we are striving to be a 100% Paul Harris Fellowship club along with 100% participation in the Every Rotarian Every Year (EREY) initiative. All new members are automatically provided \$500/points by the club to cover half of the cost of their Paul Harris Fellowship. Our 10/10 club affords the opportunity for the new member to contribute \$10 each month (\$30 per quarterly billing) until the remaining \$500 are contributed.

Membership dues are billed quarterly and are due and payable upon receipt. Your membership in the Boulder City Sunrise Rotary Club may be terminated if we do not receive your dues payment.

As of January 2013, club dues for each quarter are as follows:

- \$160 Standard Member (\$120 for meals and \$40 for quarterly dues that includes a subscription to the Rotary Magazine)
- \$50 One time initiation fee for a New Member

In addition, members will be charged \$10 for each guest they bring to a weekly meeting.

A member may wish to pledge to the Annual Fine Limit, used for operations of the club, and donate to the Annual Boulder City Sunrise Rotary Club's Scholarship Fund. One quarter of each to be included in the quarterly billing.

Members attending another Rotary Club and paying the meal charge for that club shall note the missed Boulder City Sunrise Rotary Club meeting date and may deduct up to \$10 from their quarterly dues invoice for each occurrence.

New Member Process-

- 1) The sponsor invites the candidate to several weekly breakfast meetings and a "guest badge" is obtained from the Sergeant-At-Arms. Currently the club is covering the cost of breakfast for prospective members. During the breakfast the sponsor will be asked to introduce his/her guest to Club members. To avoid future potential embarrassment, the sponsor should **not** introduce the guest as a future new member of the Club since membership in the Club is not assured. The sponsor should encourage the candidate to access the club website at www.bcsr.org and review the content.
- 2) The sponsor should inform her/his guest about Rotary in general terms, noting the emphasis placed on attendance at the Thursday meetings and mentioning the annual membership cost (annual dues + PH pay back + fines).
- 3) After the potential new member has attended at least two meetings with the sponsor and the sponsor has determined that the person is interested in becoming a member of the Club, the sponsor completes a New Member Proposal form and gives/faxes it to the Membership Committee chair and the Secretary. The New Member Proposal Form is available on the Club's internet site in the Club Documents area. The form can also be obtained from the Secretary. When completing the form, the sponsor should include any community or charitable organization activities that the proposed new member has participated in.



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- 4) The Membership Chair may call the sponsor to ask for more information so he/she can formally propose the person for membership in the Club at the next Board meeting or by e-mailing pertinent information to members of the Board.
- 5) If the Board believes that the candidate would be a positive addition to the Club, the Board conditionally approves the candidate for membership. This can be done at a Board meeting or via a vote utilizing e-mail.
- 6) After receiving conditional approval from the Board, the Membership Chair sends an e-mail to all Club members to notify them that the person has been proposed for membership in the Club and asking for any input members might have.
- 7) If no Club member provides negative input within one week, the candidate is automatically approved for membership and the Membership Chair informs the sponsor of this fact. If negative comments are received, the Membership Committee conducts an information gathering investigation. This investigation may include inviting the member(s) who provided negative feedback to a Board meeting to state the reasons for the negative input. The Board then votes to accept or reject the proposed new member. The sponsor will be informed either way.
- 8) The Membership committee accepts volunteers and assigns a mentor for the new member. The mentor is expected to sit with the new member at meetings, and meet with the new member outside of the scheduled weekly meetings in order to assist with the new member indoctrination into our club.
- 9) The Membership Chair schedules an orientation session (Fireside Chat) for the new member that includes the sponsor, the President and up to two members of the Membership Committee.
- 10) Finally, the new member is formally inducted into the Club by the Club President at a Thursday morning meeting and given his/her Red Badge.

Leave of Absence Policy

Members of the Boulder City Sunrise Rotary Club may request a leave of absence at any time, for personal, work, or medical reasons. All leave of absences must be approved by the Rotary Board of Directors, and members must be in good standing with all dues paid up to date and complete the "Excused Absence" form found on the BCSR web site.

There is a maximum of an approved three month leave of absence allowed for personal or work reasons. Review by the Board of Directors is required at the end of each three month period and, with approval, extended for another three months. Unlimited medical leave of absences are allowed.

While on leave of absence, a member must pay their dues of \$160 per quarter (sufficient to cover the club, district and Rotary International portion of your dues). A member may continue to attend meetings and events whenever possible, and is responsible for deducting payment for meals from the invoice for each meeting missed.

A member may return from a leave of absence at any time with notification to the Secretary and Treasurer for member statusing and invoicing.



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The R-85 Rule

The 85 Rule is a special category of membership for the Boulder City Sunrise Rotary Club. When a Rotarians age plus the number of years they have been in Rotary totals up to 85, they may decide to opt to be an 85er. For example, if you are 65 years old and have been a Rotarian for 20 years, this totals 85 and you are eligible for this type of membership. The use of the 'Excused Absence Request Form' (found on the BCSR.org web site) and subsequently submitted to the Board of Directors for a approval is encouraged.

In most cases, if you regularly attend Rotary meetings, then you should continue your regular membership.

However, if you are unable to attend regularly, because of health reasons or because you spend the winter in warmer climates, or for any other reason, but still want to be a part of the Boulder City Sunrise Rotary Club, thanks to your long membership in Rotary, you can do this through the 85 Rule.

The R-85 member does not get billed for meals and can either pay the meal cost at the door or add the cost of meals for meetings attended to the quarterly dues invoice.

Honorary Rotarians

The Boulder City Sunrise Rotary Club may from time to time extend an Honorary membership to a member of the public or existing Rotarian, to honor them for their service to the community and / or the Boulder City Sunrise Rotary Club. Honorary Rotarians are recognized as full Rotarians at this Rotary Club, but are NOT recognized by Rotary International, and do not pay club, district, or RI dues. Honorary Rotarians may attend all meetings, events, and functions, but must pay for their participation if there are any fees associated with these events (ie, the cost of breakfast, etc). An Active Rotarian who has been a member for at least 20 years and is experiencing some kind of medical or other hardship may be offered an Honorary Rotarian status with the approval of the club board of directors.

Rotarians Transferring from other Clubs

Any Rotarian wishing to transfer to the Boulder City Sunrise Rotary Club must be a member in good standing with their prior club, must be 'terminated' from the prior club and must be sponsored by a member of the Rotary Club of Boulder City Sunrise.

Corporate Membership Program

Premise

A corporate membership category will increase the club's ability to attract and retain a qualified and diverse entrepreneurial base within the community. It allows for flexibility and recognizes the tremendous mobility that is the norm within the current business environment.

Program

Considerations for corporate membership in the Boulder City Sunrise Rotary Club include the following:



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1. **Approval.** A corporate entity or organization can become an eligible corporate member of the Boulder City Sunrise Rotary Club.
2. **Designees.** Once an entity becomes an active member through the established approval process, it may appoint up to two persons to be its designees, one of whom must be a member of that entity's ownership; the others can be individuals employed full time by the eligible corporation.
3. **Changing designees.** The club will determine the ability of the eligible corporation to change any of its designees so long as at all times one of them is a member of the eligible corporation's ownership.
4. **Inductions.** A corporate member designee will be formally inducted into the club as established by the club.
5. **Attendance.** The attendance requirement for an eligible corporation will be any one designee attending the weekly meeting or completing other club recognized attendance requirements.
6. **Classification.** The classification of the eligible corporation and its designees will be established by the club. Because a corporate member is an official member of the Rotary club, this classification will be counted toward the classification limits set forth in the RI constitution, Article 5, Section 2(b).
7. **RI registration.** Each designee will not be listed as an official member of the Rotary club but will be noted in the roster that they are designees of the eligible corporation.
8. **Badges.** Badge references will be determined by the club.
9. **Votes and quorum.** For the purpose of general meetings and club matters, designee voting will be established by the club. Only active members of the Rotary club apply toward RI election voting.
10. **Holding office.** Only active members can hold office in the Rotary club, corporate members may not.
11. **Financial obligations.** The financial obligations of an eligible corporation may be as follows:
 - (a) Initiation fee for Active Member: \$50.
 - (b) RI dues: Payable for each member as stipulated by RI Bylaws 17.030.
 - (c) Annual club dues: Standard club dues for 1 member.
 - (d) Meal costs: Standard club cost for 1 member*.

*If more than one designee attends a single meeting, additional meals will be billed to the Active Member.



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12. **Conversion.** A designee of the eligible corporation, while still an employee of the eligible corporation, may apply for active membership of the club at any time
The club will establish how initiation fees, dues, and costs will be handled. The club will also determine whether and how a designee who has been a member, upon leaving the employ of the corporation, can convert his/her membership to an active membership.
13. **Bulletin and communication.** The active member will receive the club's weekly bulletin/ newsletter and regular club communications.
14. **Receipt of *The Rotarian* or Rotary regional magazine.** The active member will receive the relevant RI magazine.
15. **Public liability cover.** The corporate member designees will be included under the respective club liability insurance while participating in any approved club activities or projects, if applicable.
16. **Participation in youth activities.** The corporate member designees are expected to abide by all restrictions, policies, and procedures with respect to club activities involving youth.
17. **Termination.** The process for terminating the membership of a designee or the eligible corporation will be determined by the club.

Meetings

Meeting Agenda

The meeting agenda generally follows the schedule below, although the President may change the agenda from time to time in order to accommodate things such as the needs of guest speakers, announcements, a large number of guests, etc.

6:50 AM+/-	Breakfast
7:00 AM-	President's Welcome Pledge of Allegiance Invocation
7:10	Introduction of Visiting Rotarians Introduction of Guests Rotary Celebrations Rotary Announcements Rotarymercials Induction of New Members Rotarian of the Week
7:20	Program / Guest Speaker Opportunity Drawing
8:00	Meeting Conclusion



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Guest Introduction Etiquette and Policy

Our Rotary Club often hosts many guests at our breakfasts. In the interests of time, and protecting our members from being captive to extensive marketing or campaigning by our guests, it is important to follow the guest introduction process below.

Guest Introduction Process

- Visiting Rotarians with club affiliation are to be introduced first.
- Please state the Guest's Name, Guest of Sunrise Rotarian and the guest's Business or Community Affiliation.
- If they are a candidate for office you may mention that.
- A candidate for office may not address the Rotary Club in any form, including Rotarymercials
- Do **not** give the microphone to the guest at any time. If a guest wishes to address the club they should seek the approval of the President in advance for the Rotarymercial segment. We will not be a captive audience to promotions of any kind, and the sergeant shall be the gatekeeper and decision maker for these types of announcements.
- Do **not** mention the number of times a guest has visited or that they are in process of becoming a Sunrise Rotarian. You may say that they are "visiting again". A person may not always be approved for membership and this could be potentially embarrassing for them. If a person has been approved and is being inducted at that meeting, you may mention that.

Program / Guest Speaker Policy

The members of the Boulder City Sunrise Rotary Club are a highly influential, affluent, and desirable audience for many businesses, charities, and other organizations. It is important that we present quality programs of interest to our members while at the same time protecting our members.

There are a limited number of available program spots (approximately 35) each year. Our programs should address a variety of topics and causes, and should be informational, fun, or entertaining. Programs should not be self-promoting, and in general provide useful, informative, educational, or entertainment value to our members.

In the case of non-profits and charities, in the interest of fairness, the limited number of speaking slots, and the necessity of having a balanced variety of programs, it is not possible to allow a significant number non-profits and charities to address the club each year. Allowed programs would consist of organizations that have received support from or supported the Boulder City Sunrise Rotary Club, Rotary District 5300, Rotary International, or their members.

Program Presenters may not request contributions or other monetary support during their presentations, although they can ask for volunteers, and bring flyers, brochures, and other items to place on the tables **before** the meeting begins. These items are not to be distributed **during** the meeting. The primary purpose of the materials distributed should be to provide information about the organization, and these materials may ask for donations and other support, but it should not be the sole purpose of the materials distributed.

Rotary Announcements

Rotary Announcements are governed by the Club President. Any announcement during this phase of the meeting must be related to Rotary, either our club or a sister club. Please try to give as much advance notice of any announcements as you can, so the President can adjust the meeting schedule



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to accommodate the time you need to speak. It is important to stay on schedule so that we do not unfairly infringe upon fellow Rotarian's Rotarymercials and our guest speaker's time.

Rotarymercials

Rotarymercials are governed by the President. Any reference to activities outside of Rotary can be made during this phase of the meeting but must be limited to no longer than 2-4 minutes. Examples are normally community-advancing activities, such as parades, galas and fundraisers. It is important to keep within the time limit so not to unfairly infringe upon our guest speaker's time. Please try to give as much advance notice as you can, so the President can adjust the meeting schedule. If there are a large number of Rotarymercials, the President may ask you to present your Rotarymercial at another time.

Unlike other clubs, here, there is no fee for this type of announcement (although there may be a fine assessed).

Rotarian of the Week

The Rotarian of the Week, when executed, is a Boulder City Sunrise Rotary Club Rotarian whose personal history, Rotary and community service is highlighted in a given week. The Rotarian of the Week is selected by the Club Service committee from nominations from the membership or the Club Service committee. Members may not nominate themselves.

CLUB ORGANIZATION

The Boulder City Sunrise Rotary Club is governed by the current adopted versions of our [Club Bylaws and our Club Constitution](#).

Board of Directors

The Board of Directors establishes policy and sets the direction of the club and oversees the clubs operation.

Club Service

Club Service focuses on strengthening fellowship and ensuring the smooth functioning of Rotary clubs. Our Club service committee plans monthly fellowships, holiday parties, Rotarian of the Week and District Conference Hospitality room. Our club's Hearts and Flowers subcommittee is comprised of the Secretary charged with distributing good cheer to Rotarians in need of a pick me up.

Vocational Service

Vocational Service involves club members serving others through their professions and aspiring to high ethical standards. Rotarians, as business leaders, share skills and expertise through their vocations, and they inspire others in the process.

Community Service

Community Service is the opportunity Rotary clubs have to implement club projects and activities that improve life in Boulder City. Our Public Relations team insures club success by building a strong link between Sunrise Rotary and the community.



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International Service

International Service encompasses efforts to expand Rotary's humanitarian reach around the world and to promote world understanding and peace. It includes everything from contributing to Polio Plus to helping Rotary Youth Exchange students adjust to their host countries to contributing toward clean water initiatives through the world.

New Generations Service

The Avenue of New Generations Service recognizes the positive change implemented by youth and young adults involved in leadership development activities, community and international service projects, and exchange programs that enrich and foster world peace and cultural understanding.

Condolences and Well-Wishes

As a policy of the Board of Directors and when applicable, the Club President shall coordinate the delivery of sympathy items on behalf of the Boulder City Sunrise Rotary.

A. Notification

Upon notification of the death of a member or an immediate family member, or of a member's illness and/or injury, it shall be the responsibility of the Club President to initiate the process of sending items of sympathy.

1. During the notification of a death, the president must obtain the name of the deceased and the address in which the sympathy item will be sent.

B. Condolences

When a death of a member or an immediate family member occurs and as a policy of the Board of Directors, the Club President shall initiate the Club's efforts to send a sympathy gift on behalf of the Boulder City Sunrise Rotary.

1. The Club President may delegate the delivery process associated with the coordination of sympathy gifts to any member of the Club.
2. At a cost of no more than \$100 and from the Board of Directors annually approved flower vendor, said sympathy item shall be in the form of a flower arrangement/house plant.
3. Depending on the wishes of the family, flowers will be sent to the funeral home, the member's home, or when requested; the Club may choose to make a \$50 donation in memory of the deceased to the family's charity of choice.
4. For the purpose of this policy, an immediate family member is defined as a spouse or partner, son or daughter (including stepchildren), brother or sister, grandchildren, and the member's parents and grandparents.

C. Well Wishes

When an illness or injury of a member occurs and as a policy of the Board of Directors, the Club President shall coordinate the Club's efforts to send a sympathy card on behalf of the Boulder City Sunrise Rotary.

1. The Club President may delegate the delivery process associated with the coordination of sympathy cards to any member of the Club.
2. Unless otherwise indicated, said "Get Well Soon" card shall be sent to the member's home address.



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Loaning Club Equipment

As a policy of the Board of Directors, the Club President shall coordinate the process of loaning equipment owned by the Boulder City Sunrise Rotary.

A. Roles & Responsibilities

The Club President, with the help of the Sergeant At Arms (Club's Equipment Loan Officer), shall be responsible for maintaining and the inventory process associated with the Club's equipment.

B. Request, Pick-up, and Return Process

Members or other non-profit organizations wanting to borrow equipment owned by the Boulder City Sunrise Rotary, shall initiate the request by contacting the Club President.

1. Once notified, the Club President shall forward a Club **Equipment Loan Request Form** to the person requesting the equipment.
2. Once the request form is returned and through his signature, the Club President shall forward the approved form to the Club's Equipment Loan Officer for processing.
3. Once received, the Club's Equipment Loan Officer shall ensure the equipment is available and shall coordinate the equipment pick-up process. During the pick-up process the Club's Equipment Loan Officer shall obtain a signature of the person picking up the equipment.
4. At the conclusion of the loan period, the Club's Equipment Loan Officer shall coordinate the return of the equipment and through the return of the request form, shall inform the Club President that the equipment loan process has been completed.

C. Inventory & Storage Unit Control

In an effort to ensure the security of all club equipment, an annual inventory process and storage unit access audit shall be conducted.

1. At the beginning of each Rotary Year, the Club's Equipment Loan Officer shall coordinate the process of conducting an annual equipment inventory process. At the conclusion of the process, the Club's Equipment Loan Officer shall submit his or her findings to the Club President and ultimately the Board of Directors.
2. Once approved by the Board of Directors, the Club's Equipment Loan Officer shall utilize said list during the process of loaning equipment.
3. At the beginning of each Rotary Year and in an effort to maintain the integrity of the equipment loan process, the Club President shall coordinate the process of changing the access code to the clubs storage unit. Once completed, only the Club President, appointed designees, and the Club's Equipment Loan Officer shall have access to the unit.



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Equipment Loan Request Form

This form assigns primary responsibility for Boulder City Sunrise Rotary Equipment to the person receiving such Equipment. The person requesting the Equipment will be responsible for taking the necessary precautions to protect the Equipment and to store it in a manner that provides adequate protection, thus not subjecting the Equipment to possible theft or damage.

Describe Equipment Loan Request (be specific)

Members Name or Person Requesting Equipment _____

Phone Number _____ Today's Date _____

Requested Equipment Loan Period _____

Requesting Person's Signature _____

As part of the equipment loan process and through my signature above, I hereby agree to the following terms:

1. The person requesting the Equipment will be responsible for return of the Equipment in like condition as received. If loss or damage of the Equipment occurs and determination is made that the loss or damage is a result of negligence, the person requesting the equipment may be held financially responsible for the repair or replacement of the Equipment.
2. Equipment cannot be loaned or transferred to a third party. Loaned Equipment cannot be modified in any way without written approval of the Club's President.

Pick-up Date _____ Loan Officer Signature _____

Return Date _____ Loan Officer Signature _____

Note: Documenting the return date and signing said form, the Equipment Loan Officer is certifying that all loaned equipment has been returned in good condition and stored into the Club's storage unit.