

GROUP-SPONSORED OA EVENTS: OBTAINING FUNDING FROM MWI

PROCEDURE AND APPLICATION

Rationale: To encourage OA groups to sponsor more events for members by removing any financial obstacle for doing so and to establish guidance for obtaining financial support from MWI for such events so that the process can be straightforward for this and future Boards. Since OA Group treasuries routinely retain only their “prudent reserve,” it is possible that an individual group may not have the resources to host an event on their own; MWI wants to help in this regard. If a group can support its own program event, this funding request procedure would be unnecessary.

METHOD

1. An OA Group submits to MWI the accompanying application to describe the event they want to host and provide an estimate of the cost (rent, materials, etc.).
 - a. Generally, it is expected that the expenses would be reimbursed by MWI *after* the event when the expense receipts would be submitted to the MWI Treasurer.
 - b. If money is needed for upfront costs in advance of the event, the request should specify this and name the amount of the advance requested and date needed.
2. The MWI Board will discuss the application. If the Board votes in favor of supporting the event, the amount of the funding is ordinarily stated as an “up to ###” dollar amount. If the application included a request for an advance, the MWI Board will discuss this and act on a case-by-case basis.
3. Typically, any OA member event would take up a Seventh Tradition collection. Therefore it is expected that the income from this collection would be applied to the costs of running the event. A shortfall between total cost to mount the event and total income from the event’s 7th tradition collection would be eligible for reimbursement by MWI (*see #4 below*).
 - a. If the group had received an advance from MWI, and the 7th Tradition collection exceeds the amount of the MWI upfront advance, the group is kindly requested to return the excess amount with its next MWI donation.
4. Following the event, the Group’s request for reimbursement then should be submitted with applicable expense receipts to the MWI Treasurer who will make payouts accordingly.

PLEASE COMPLETE THE APPLICATION ON PAGE 2

MetroWest Intergroup

□ **Event Grant in Advance Request Form** □ **Post Event Grant Application Event Form**

Today's Date: _____

Group Meeting Location, Day and Time: _____

Title of Event: _____

Date and Time of event: _____

Location of Event: _____

Please Describe Event. Include cost estimates where applicable (e.g. rent, materials, literature):

Please Provide the Following Information:

Requested by: _____

Email address: _____

Phone: _____

Amount Requested for event: _____

Check Payable to: _____

Address: _____

Date needed: _____

Amount requested: _____

Description/Purpose of funds: _____

Please submit form to treasurer@metrowest.org with form and receipts. Completed checks will be mailed to the address provided.

To be completed by Treasurer:

Check #: _____

Amount: _____

Initials: _____

Issue Date: _____